
Homeless Management Information System (HMIS)

Indiana Housing &
Community
Development Authority

10/2012

Table of Contents

Objectives	5
HMIS Staff.....	6
Help Desk.....	6
HMIS Security Policies and Procedures	6
Privacy and Client Information Restrictions	7
HMIS Computers.....	8
Passwords.....	8
Logging In	8
User Login.....	9
Client Look-Up	15
Add a New Client	18
The Workflow	20
Add Household Members	22
HMIS Barriers Assessment	29
Domestic Violence Assessment.....	30
Financial Assessment Cash Benefits	31

Financial Assessment Non-Cash Benefits	33
Employment Assessment	35
Adult Education Assessment	36
Health Assessment	37
Enrollment process for Child and/or other Household Member	39
Universal Data Assessment	39
HMIS Barriers	41
Financial Assessment Cash Benefits	42
Financial Assessment Non-Cash Benefits	44
Child Education Assessment	46
Health Assessment	47
The Client Dashboard	50
Adding Services	54
Quick Services	57
Case Notes	58
During Program Assessment	61
Exit Client	63
Universal Data Assessment	66
Financial Assessment	68

Financial Assessment Non-Cash Benefits	70
Employment Assessment	73
Adult Education Assessment	73
Log out of ClientTrack	76
How to Contact the Help Desk	77
Notes	77

Homeless Management Information System (HMIS) New User Training Manual

A Homeless Management Information System is an electronic data collection system that stores longitudinal client-level information about persons who access homeless prevention and/or homeless services. HMIS is a valuable resource from the participating homeless assistance and homeless prevention programs in a Continuum of Care (CoC). Aggregate HMIS data can be used to understand the size, characteristics and needs of the homeless population at the local, state and national levels. The HMIS enables information about client needs, goals and service outcomes. To access the HMIS System use the link below, this link can also be accessed through the IHCD website.

<https://ihcdaonline.com>

Objectives

- Review IHCD Implementation of ClientTrack™ and important changes in data collection
- Review HMIS Security Policies and Procedures
 - Implied Consent Policy
- Learn to log in and complete the following actions:
 - Client Look-up
 - Client Entry
 - HMIS Program Data Intake Workflow
 - Enter Services
 - Case Notes

- Complete During Program Enrollment Assessment
- HMIS Program Data Exit Workflow
- Submission of Issues to IHCD
- Sign Out

→ Review HMIS Contacts for IHCD

HMIS Staff

Kerrie Kikendall HMIS Program Manager, kkikendall@ihcda.in.gov, 317-234-6973

Brennan Butler, HMIS Systems Specialist, bbutler1@ihcda.in.gov, 317-234-7572

Fax Number: 317-232-7778

Help Desk

HMIS related issues concerning ClientTrack™ should be submitted to:

HMISHelpDesk@ihcdaonline.com

HMIS Security Policies and Procedures

Personal protected information (PPI) is considered any information that could lead to individual identification. Participating agencies should have procedures in place for the secure storage and disposal of hardcopy and electronic data generated from the HMIS or created for entry into the HMIS. PPI should be stored in locked drawers/file cabinets and hardcopy data should be shredded before disposal. Electronic PPI data including information contained on disks, CD's, jump drives, computer hard drives and/or other media

should be reformatted before disposal.

Privacy and Client Information Restrictions

The Notice of Privacy Practices including the purpose for data collection should be posted in a public area and in an office where an intake professional meets with clients. The full Privacy Policy Notice is available on the IHCD website and should be made available to clients upon request.

A signed client consent form is no longer required. A client who presents to your agency for services and provides information is giving implied consent to enter and share certain data in the HMIS. However, there is some information that will not be shared with other agencies. Information that will not be shared includes HMIS Barriers, domestic violence status and case notes.

Additional information regarding client consent and restrictions will be covered in more detail during training. ***No homeless person is to be refused services regardless of their participation in HMIS.***

HMIS Computers

All computers that are used to access the HMIS should be situated in secure locations. HMIS computers in publicly accessible areas should be staffed at all times and should not be viewable by other individuals. All computers should be password protected and the password you use to log onto your computer should NOT be the same password as your HMIS password, but rather a password to prevent access to the computer itself.

Passwords

HMIS usernames and passwords should NOT be shared with other users. Users should not keep username/password information in a public location (i.e. sticky notes on monitors or filed under ClientTrack™ or Password in a Rolodex). HMIS security policies require the use of strict passwords.

- Must have at least one number
- Must be between 8 and 12 characters
- Must have at least one non-letter, non-numeric character
- Must contain at least one capital letter
- New passwords will be required upon first login
- Accounts are automatically deactivated after 30 days of inactivity

Logging In

ClientTrack™ is a web-based application. In order to log into ClientTrack™ you will need to use an internet browser. ClientTrack™ will work with Microsoft Internet Explorer, Safari, and Mozilla's Firefox.

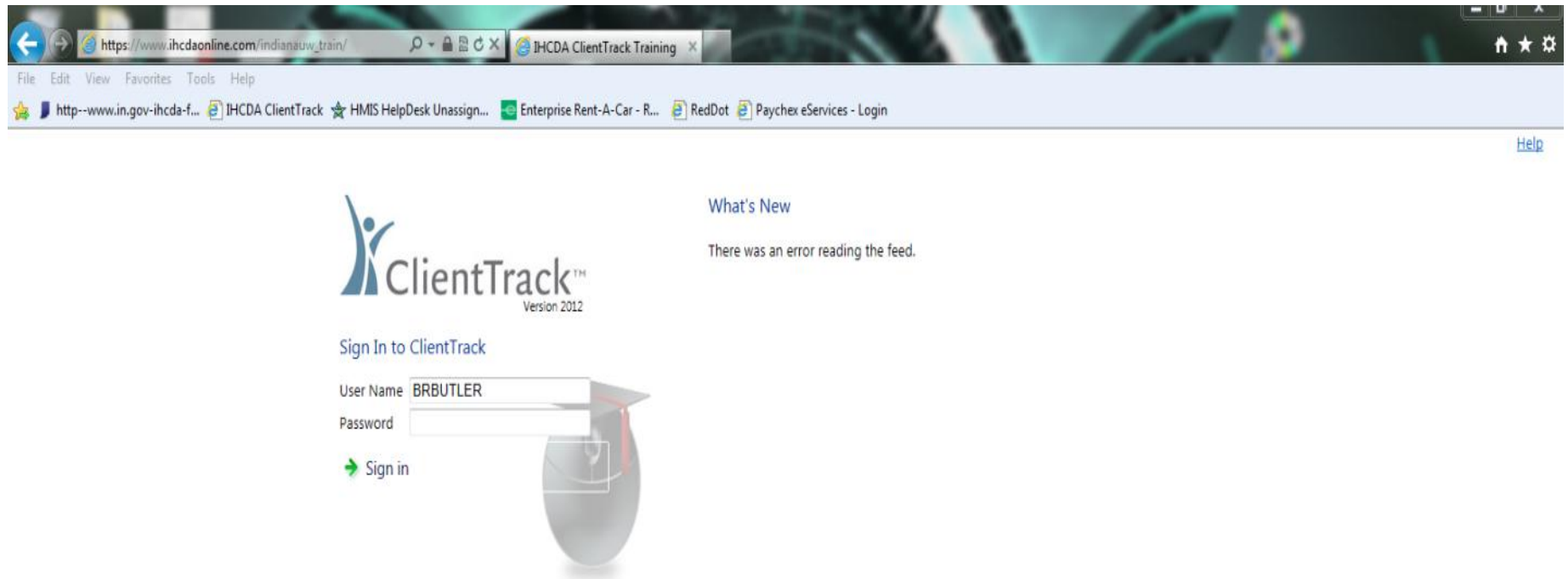
User Login

Open your web browser and go to <https://ihcdaonline.com> . Select the box labeled “ClientTrack”.



Enter your assigned User Name and Password and click “**Sign In**”. You will be required to reset your password upon your first login. **Remember, sharing your user name and password is not permitted. Passwords**

are case sensitive and pop-up blockers must be turned off to access the application. You should change your settings to allow for pop-ups from this site.



When prompted to select a workgroup, most users will select “**IHCDA HMIS: HUD Competitive Programs User**”. Your organization may participate in other workgroups, so be sure to select the appropriate workgroup. Also, make sure your organization and location is selected appropriately. Click on “**Use These Settings**” to continue.

Browser window showing the IHCDA ClientTrack Training page. The address bar displays https://www.ihcdaonline.com/indiana_uw_train/. The page title is "IHCDA ClientTrack Training".

Navigation links: File, Edit, View, Favorites, Tools, Help.

Quick links: <http://www.in.gov-ihcda-f...>, IHCDA ClientTrack, HMIS HelpDesk Unassign..., Enterprise Rent-A-Car - R..., RedDot, Paychex eServices - Login.

[Help](#)

ClientTrack™
Version 2012

What's New
There was an error reading the feed.

Workgroup
IHCDA HMIS: HUD Competitive Programs

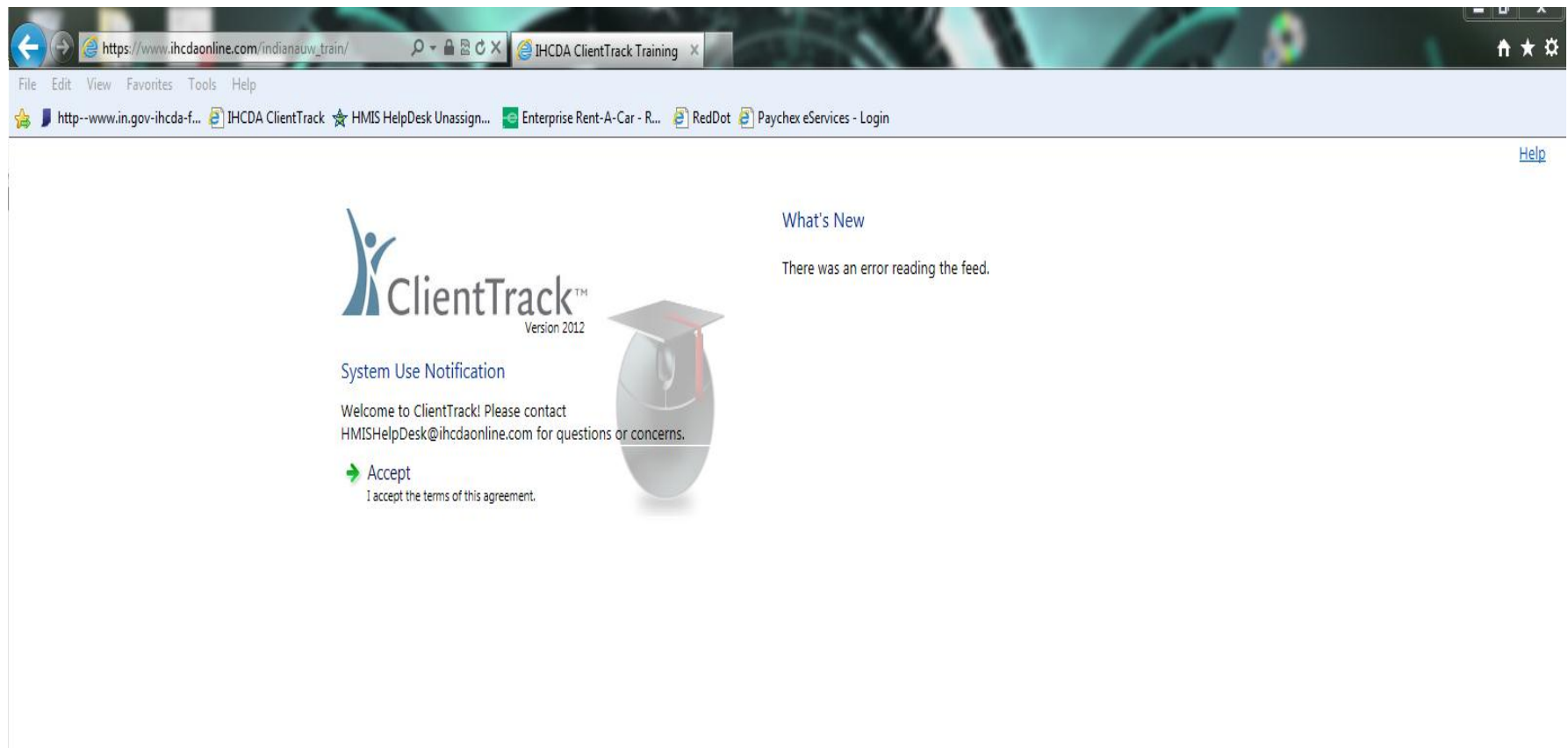
Organization
Aurora Inc
Blue River Services
Bountiful Harvest Ministries
Bridge Community Services

Location
Aurora Inc - Main

Use these settings
Open ClientTrack using these settings.

"Accept" the Terms of Agreement

*****The HMIS Help Desk email will always be displayed on this page.***



You will be directed to your User Dashboard. You will be notified of any important “HMIS News” items that IHCD wants to communicate to you; i.e. upcoming trainings, etc. Other features to become familiar with on this screen include Tabs (Home, Clients) and Menu Items (along the left side of the screen). Your Home screen will also give you a list of your case assignments, upcoming assessments due, paused workflows, and current program enrollments.

https://ihcdaonline.com/2012/MainPage.aspx?Inline=false

File Edit View Favorites Tools Help

http--www.in.gov-ihcda-f... IHDA ClientTrack HMIS HelpDesk Unassign... Enterprise Rent-A-Car - R... RedDot Paychex eServices - Login

Welcome Brennan Butler (Training)

Settings Help Sign Out

ClientTrack ESSENTIALS

Search Menu

User Dashboard

My ClientTrack

Recent

Active Cases

Current Enrollments

Recent Case Notes

Quick Services - Multiple Clients

My User Configuration

Paused Operations

Users & Workgroups

My ClientTrack

Reports

Administration

Welcome Brennan Butler (Training)

Home Clients

Organization: Aurora Inc

Workgroup: IHDA HMIS: HUD Competitive Programs - User

Welcome Brennan Butler

HMIS News

WELCOME TO HMIS/CLIENTTRACK TRAINING

from your administrator, Michelle Milliken

Welcome to the HMIS/ClientTrack training!!

Please routinely check this area for updates and trainings from IHDA.

My Case Assignments

Client Name	Begin Date	End Date	Program
Dotty Junior, John	09/06/2012		Emergency Solutions Grant (ESG-RR)
Test, Billy	08/10/2012		Aurora - Outreach Team (SSO-R12-82)
Test, Trisha	08/13/2012		Aurora - Shelter Plus Care Program (PH-R12-82)
Test, Trisha	08/13/2012		Aurora - Street Count Non-HUD (SSO-R12-82)
Test, Trisha	08/13/2012		Aurora - Shelter Plus Care Vouchers (SSO-R12-82)

Aurora Inc's Upcoming Assessments Due

Client	Enrollment	Enroll Date	Days Enrolled
▶ Aurora - SHP Outreach (R12) - Aurora - Outreach Team (SSO-R12-82) - 11			
▶ Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82) - 12			
▶ Aurora - SPC Vouchers (R12) - Aurora - Shelter Plus Care Vouchers (SSO-R12-82) - 21			
▶ HPRP Balance of State - (HPRP) Region 12 - 6			

Brennan Butler's Paused Workflows

Workflow	Description	Started	Accessed

Current Program Enrollments

Program	Cases	Clients
(HPRP) Evansville	6	8
(HPRP) Region 12	29	45
Aurora - Outreach Team (SSO-R12-82)	77	94
Aurora - Shelter Plus Care Program (PH-R12-82)	100	162
Aurora - Shelter Plus Care Vouchers (SSO-R12-82)	30	32
Aurora - Street Count Non-HUD (SSO-R12-82)	2	3
Emergency Solutions Grant (ESG-RR)	3	5

*****The first time you log into ClientTrack, you will need to follow these instructions in order to get the Menu items along the left side of the screen to appear.***

Client Look-Up

Click on the “**Client Tab**” at the top of screen. Select “**Find Client**” from the menu items along the left of the screen. Enter the name of a client that is currently enrolled in your program. Click “**Search**” in the bottom right hand corner. Select the client from the list that is displayed. Once the client dashboard is visible, click the “**Case Management**” item on the bottom left hand corner of the screen. All Menu items on the left of the screen should now be visible.

It is imperative you do not enter a duplicate client record into the system in order to ensure the accuracy and overall quality of the HMIS data. Even though ClientTrack™ will warn you of potential duplicates, it is important to search for clients and other household members prior to the start of adding a new client. To search for an existing client in the database, click the “**Find Client**” menu item on the Client tab.

Tech Note

To speed the search process and reduce the chance for input error, input as few characters as possible in the criteria fields. Also, you can use the wildcard character %. For example, J% would filter the results by any string beginning with J. Another example is %on. This would filter by any string containing ‘on’.

Browser address bar: <https://ihcdaonline.com/2012/MainPage.aspx?Inline=false>

Page Title: IHCDA ClientTrack Training | Indiana Housing & Commu...

Navigation: File Edit View Favorites Tools Help

Search Bar: <http://www.in.gov-ihcda-f...> IHCDA ClientTrack HMIS HelpDesk Unassign... Enterprise Rent-A-Car - R... RedDot Paychex eServices - Login

ClientTrack ESSENTIALS

Welcome Brennan Butler (Training)

Settings Help Sign Out

Home Clients

Search Menu

Find Client Intake Workflow

Case Management

Client Dashboard

Edit Client

Family Members

Assessments

Enrollments

Services

Case Notes

Paused Workflows

John Dotty Junior

SSN: 999-99-9999

Birth Date: 2/8/1980

ClientID: 909356

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. **Social Security Number** and **Birth Date** are the best fields to narrow your search.

First Name:

Last Name:

Middle Name:

Social Security Number: - -

Birth Date:

Client ID:

Search

Cancel

You may search for a client by entering letters of the client first/last name, social security number or birth date. It is important to try different options for your search. It is best to **only** enter the first few letters of the first/last name and not rely solely on a social security number or birth date, as those elements have a higher rate of missing or inaccurate data. Another search hint is to search different spellings and remember to search for nicknames such as “Bob” in addition to “Robert” or “Bill” in addition to “William”.

3 records found.

First Name ▲	Last Name ▲	Middle Name ▲	SSN ▲	Birth Date ▲	Client ID ▼
Testing	Test		XXX-XX-2342	01/01/1980	909359
Test	Test Child			01/01/1999	909129
Test	Test		XXX-XX-2568	01/01/1982	909128

If the client is already in the system, highlight the client name in the search results and click **“Client Name”** to select. The selected client’s information will be displayed at the top of the screen. All information entered from this point forward while on the Client Tab will be associated with the currently selected client. You should click on the **“Edit Client Information”** menu item and make any necessary changes to the client demographic information.

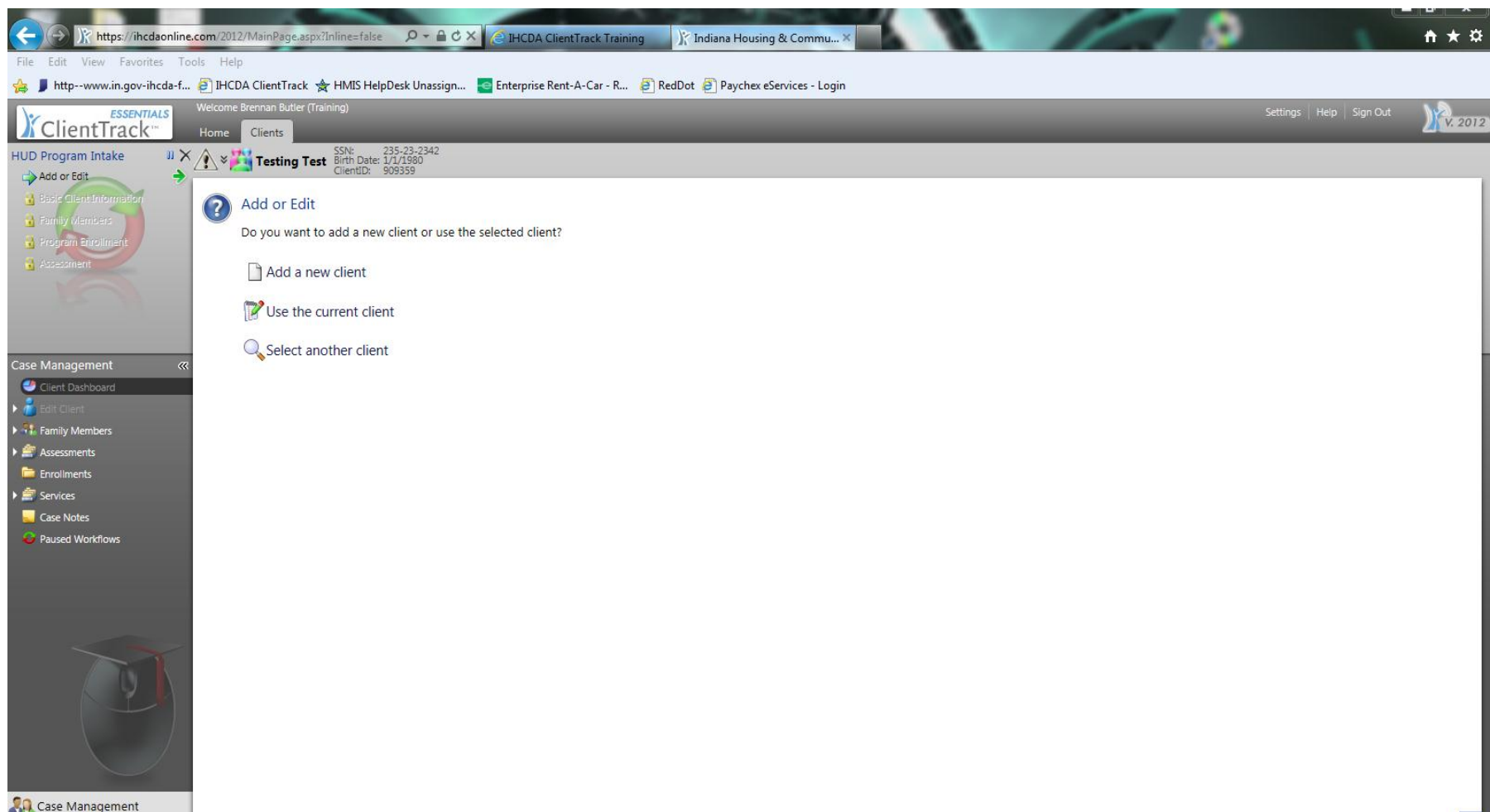
*****Please remember, the “Save” button will save the changes you made to the screen and leave you on the same page. The “Save & Close” button will save the changes you have made to the screen and move you to the next one.***

Add a New Client

In order to ensure all required assessments are completed, ClientTrack™ utilizes a specific workflow that steps you through this process. Using these built-in workflows, you will step through these processes automatically. Click the **“Workflow”** option that is appropriate. **Be sure you begin the workflow while you are on the client record for the Head of Household.** You will be asked to verify the intake information for the client. Make any changes if necessary and click **“Save”**. If there are no changes, click **“No Changes”**.

The steps for the workflow will be displayed in the upper left hand corner of the screen. The first step is the completion of the Master Assessment. On the Master Assessment screen, be sure to change the Assessment Date if different from today’s date.

To add a **NEW** client to the database, select the **“Intake Workflow”** menu item to the left. Choose the appropriate button **“Add a New Client”**. If a duplicate client already exists (and was not identified during the client lookup), a warning in red letters will be displayed. It is very important to review the displayed list. If the client is already in the system, click the client’s name to select. If the client you are entering is in fact a new client (do NOT select a client in the displayed list), click **“Next”** to proceed with the intake process.



*****IHCD is always working to eliminate duplicate clients in the HMIS. Please contact the IHCD HMIS Help Desk at HMISHelpdesk@ihcdaonline.com with clients that have multiple records in the system. When sending a notification of duplicates or any information regarding clients to the HMIS Help Desk please DO NOT include a full social security number. Client ID numbers can be found to the left of the client name on the client lookup screen or above the client name on the client dashboard.***

The Workflow

To search for a client in the system, type the first few letters of the first name and last name, and then click on the “**Next**” button on the bottom of the screen. (This will automatically search for client a second time.)

The screenshot displays the IHCDA ClientTrack Training web application. The browser address bar shows the URL <https://ihcdaonline.com/2012/MainPage.aspx?Inline=false>. The page header includes navigation links for File, Edit, View, Favorites, Tools, and Help. The main navigation bar features the ClientTrack logo and a welcome message for Brennan Butler (Training). The left sidebar contains a 'HUD Program Intake' section with links for Basic Client Information, Family Members, Program Enrollment, and Assessment, as well as a 'Case Management' section with links for Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Case Notes, and Paused Workflows. The main content area is titled 'Client Information' and features a 'Search Existing Clients' section. This section includes a green arrow icon and a red arrow icon, both pointing to the 'Search Existing Clients' link. Below this link is a text box containing the following instructions: 'The first step in adding a new client is to search existing client records for possible matches to avoid duplicate entry. Enter partial identifying information on the client, and then click Next to search from existing client records. If the system finds no potential matches, you will be taken directly to Step 2. If the system finds potential matches, the search results will display below. If an accurate match appears, select and open that existing client record by clicking on that row. If there are no accurate matches, click Next again to continue to Step 2 in adding a new client record.' The search form contains the following fields: First Name (Ivy), Last Name (Flowers), Social Security Number (315 - 86 - 9789), and Birth Date (02/08/1980). At the bottom right of the form are 'Next' and 'Pause' buttons.

ClientTrack ESSENTIALS

Welcome Brennan Butler (Training)

Home Clients

HUD Program Intake

Basic Client Information

Family Members

Program Enrollment

Assessment

Case Management

Client Dashboard

Edit Client

Family Members

Assessments

Enrollments

Services

Case Notes

Paused Workflows

Client Information

Search Existing Clients

Basic Client Information

Search Existing Clients ?

The first step in adding a new client is to search existing client records for possible matches to avoid duplicate entry. Enter partial identifying information on the client, and then click Next to search from existing client records.

- If the system finds no potential matches, you will be taken directly to Step 2.
- If the system finds potential matches, the search results will display below. If an accurate match appears, select and open that existing client record by clicking on that row.
- If there are no accurate matches, click Next again to continue to Step 2 in adding a new client record.

First Name: Ivy

Last Name: Flowers

Social Security Number: 315 - 86 - 9789

Birth Date: 02/08/1980

Next Pause

Once you have searched for the client and click “**Next**”, you will be prompted to enter demographic information for the client. Items with a red asterisk * are required fields and records cannot be saved without entering this data. Birthdate and Phone Number fields are auto-formatted so that dashes are not required when entering information in these fields. Birthdates can be entered in mmddyyyy format. Once entered, they will be automatically formatted to the appropriate display. Click on the “**Next**” button when finished.

The screenshot displays the IHCDA ClientTrack web application interface. The browser address bar shows the URL: <https://ihcdaonline.com/2012/MainPage.aspx?Inline=false>. The application header includes the ClientTrack logo and navigation links for Home, Clients, and Settings. The main content area is titled 'Basic Client Information' and contains the following fields:

- First Name:** Ivy
- Last Name:** Flowers
- Middle Name:** (empty)
- Suffix:** (empty)
- Social Security Number:** 315 - 88 - 9789
- Birth Date:** 02/08/1980
- Client Age:** 32
- Date of Birth Quality:** Full DOB Reported
- Ethnicity:** Non-Hispanic/Latino
- Race:** Asian
- Gender:** Female
- IHOPE Number:** (empty)
- Family:** Flowers, Ivy - 1980
- Relationship to Head of Household:** Self
- Address:** (empty)
- Address 2:** (empty)
- City / State / Zip:** (empty)
- Home Phone:** (empty)
- Email:** (empty)

The 'Finish' button is located at the bottom right of the form.

First Name – Legal first name (do not add nicknames in “quotes” – those are not searchable elements, add this information to the alias field)

Last Name – Legal Last Name

Social Security Number – If the client does not know or refuses to provide their SSN, **DO NOT** under any circumstance, enter a fake social security number such as 123-45-6789 or 999-99-9999. Select the data quality option that best fits the situation.

Birth Date – Month, day and year the client was born. Again, do not use a fake number. Choose the appropriate data quality option that best fits the situation

Ethnicity – Determines if a client is of Hispanic/Latino origin and includes individuals of Cuban, Mexican, Puerto Rican, South or Central American origin

Race– This is a self-identified data element and a person can identify with multiple races. This is a multi-select box that allows for multiple races to be checked

Gender – Select gender with which client identifies

IHOPE Number – This is an optional field

Household – Do NOT enter anything in the Household field. ClientTrack™ will create a household/household account

Relationship to Head of Household – When entering the first client in the household, the system will default to “Self”. It is imperative this information is entered correctly for ALL household members. Otherwise, your reports will not accurately reflect the clients and household make-up

Address – Add the address where client will be residing (emergency shelter, etc.). This is NOT the previous address of the client

Click on the “**Finish**” button when completed.

Add Household Members

Next, you will be prompted to add any additional household members.

https://ihcdaonline.com/2012/MainPage.aspx?Inline=false

File Edit View Favorites Tools Help

http--www.in.gov-ihcda-f... IHCD ClientTrack HMIS HelpDesk Unassign... Enterprise Rent-A-Car - R... RedDot Paychex eServices - Login

Welcome Brennan Butler (Training)

Settings Help Sign Out

ClientTrack ESSENTIALS

Home Clients

SSN: 315-86-9789
Birth Date: 2/8/1980
ClientID: 909362

Ivy Flowers

Family and Family Members

The selected client's family and family members are listed below. You can associate other clients with this family by searching for the client(s), or you can add new clients to the database by entering their information below.

Family Name: * Flowers, Ivy - 1980
Family Type: * Single Parent / Female

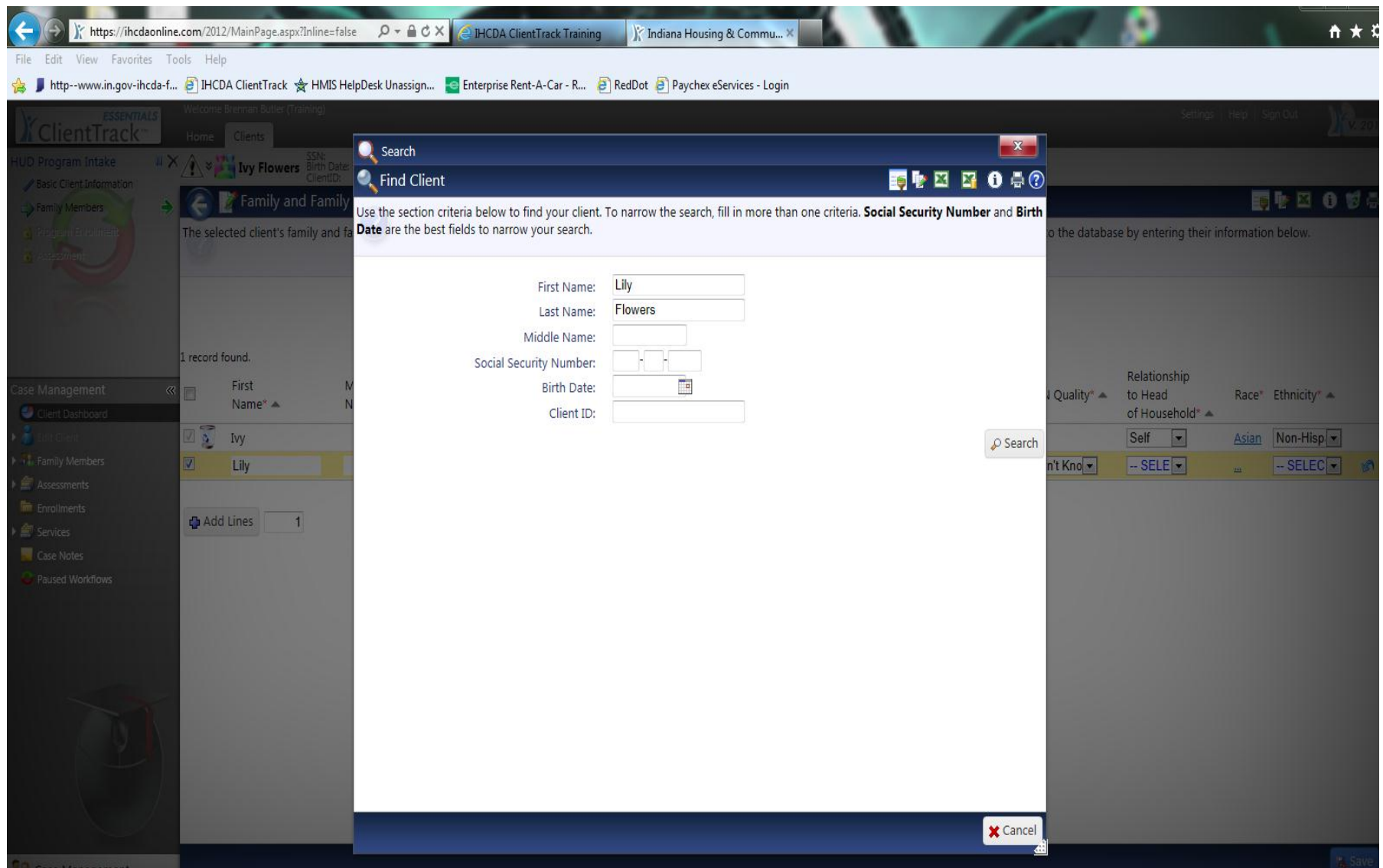
1 record found.

	First Name	Middle Name	Last Name	Gender	Birth Date	Age	Birth Date Quality	SSN	SSN Quality	Relationship to Head of Household	Race	Ethnicity
<input checked="" type="checkbox"/>	Ivy		Flowers	Female	02/08/1980	32	Full DOB	315 - 86 - 9789		Self	Asian	Non-Hisp
<input checked="" type="checkbox"/>	Lily		Flowers	-- SELECT --		N/A	Don't Know		Don't Know	-- SELE		-- SELEC

Add Lines 1

Save

Select the **"Household Type"**. Click on the **"Empty Box"** and a check mark will appear. Enter the name of the next household member, the system will complete a search for that client name.



If the client is found, select the client from the list and edit as necessary. Select “**Cancel**” if the client is not found in the system.

Please be sure to complete all information requested. For the race category, you must click on the blue line with the three blue dots to access the race categories. Be sure to select a race and then click on the “**Green Circle**” with the check mark. Be careful that you do not use the select all icon. Add lines for additional household members as necessary by clicking on the “**Add Lines**” box.

Click the “**Save**” button when all household members have been added. You will receive an error message if you are missing any required data fields. If you receive this error message, review the information and input any missing data.

The screenshot shows the 'Family and Family Members' page in the IHCD ClientTrack Training system. The page displays a table of family members for the client 'Ivy Flowers'. A dropdown menu for race selection is open, showing options like 'Asian', 'Black or African American', etc. The 'Save' button is visible at the bottom right.

First Name	Middle Name	Last Name	Gender	Birth Date	Age	Birth Date Quality	SSN	SSN Quality	Race	Ethnicity
Ivy		Flowers	Female	02/08/1980	32	Full DOB	315 - 86 - 9789			
Lily		Flowers	Female	06/01/2005	7	Full DOB	235 - 97 - 8678		Daughter	Asian
			-- SELECT --		N/A	-- SELEC --		-- SELEC --	-- SELE --	-- SELEC --

You will then be prompted to create the enrollment.

*****Remember to change the Enrollment Date if you are back dating the information. To ensure accurate data quality enter all client data in a timely manner.***

The screenshot displays the IHCDA ClientTrack Training web application. The browser address bar shows the URL: <https://ihcdaonline.com/2012/MainPage.aspx?Inline=false>. The page title is "IHCDA ClientTrack Training". The user is logged in as "Brennan Butler (Training)".

The main navigation menu includes: Home, Clients, HUD Program Intake, Basic Client Information, Family Members, Program Enrollment, and Assessment. The left sidebar shows the "Case Management" section with options: Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Case Notes, and Paused Workflows.

The "HUD Program Enrollment" form is displayed for client "Ivy Flowers". The form includes the following fields:

- Name: Flowers, Ivy
- Enrollment Date: 09/07/2012
- HUD Grant: Aurora - SPC (R12)
- Program: Aurora - Shelter Plus Care Program (PH-R12-82)
- Family: Flowers, Ivy - 1980
- Relationship to Head of Household: Self
- Case Manager: Brennan Butler
- Restriction: ☒ Restrict to Organization, ☐ Unrestricted

The bottom of the form has "Save" and "Pause" buttons.

You will be required to choose the HUD Grant and Program and click **“Next”**. *If you do not find your specific grant and/or program, cancel the workflow by click the **“X”** and please notify IHEDA immediately at HMISHelpDesk@ihedaonline.com. Please include the name of your grant and program along with specific contact information so that the issue can be resolved as soon as possible. Grant and program information must be set up in the system before you can begin to enroll clients. Click the **“Save”** button when completed.*

The screenshot displays the IHEDA ClientTrack Training web application. The browser address bar shows the URL <https://ihedaonline.com/2012/MainPage.aspx?Inline=false>. The application header includes the IHEDA logo and navigation links. The left sidebar contains a 'Case Management' menu with options like 'Client Dashboard', 'Add Client', 'Family Members', 'Assessments', 'Enrollments', 'Services', 'Quick Services', 'Standard Intake', 'Client Services Report', 'Case Notes', and 'Paused Workflows'. The main content area is titled 'Universal Data Assessment' and contains the following fields:

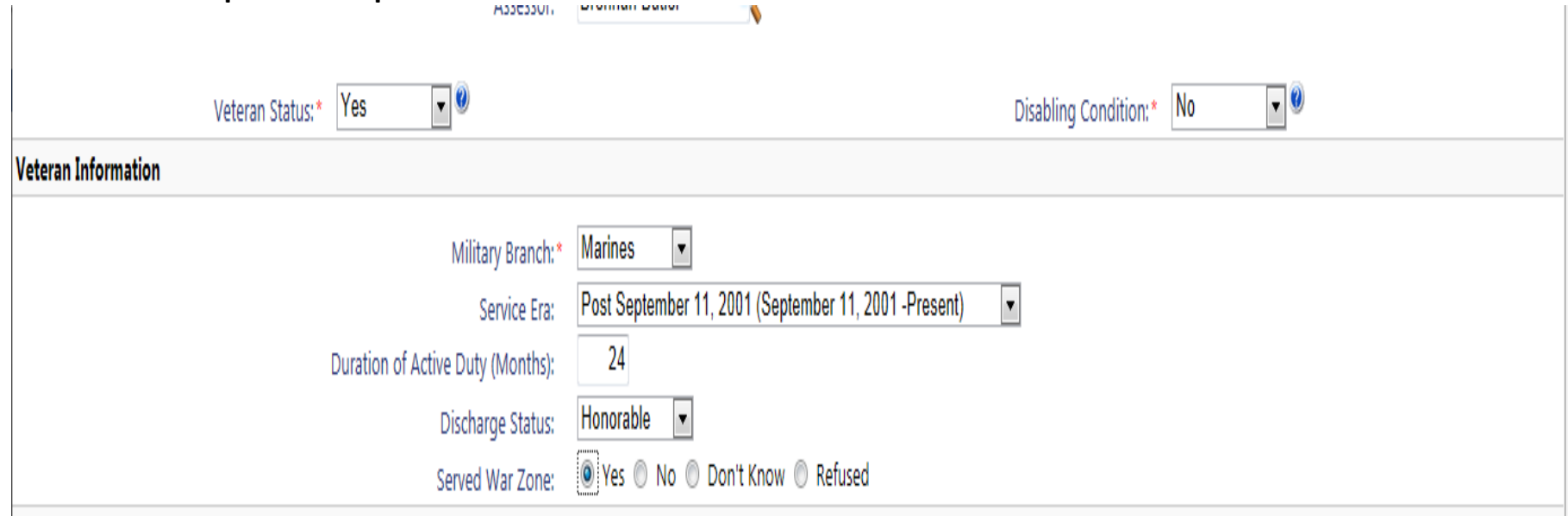
- Assessment Date:** 09/07/2012
- Age at Assessment:** 32
- Assessment Type:** Entry
- Program:** Aurora - Shelter Plus Care Program (PH-R12-82)
- Assessor:** Brennan Butler
- Veteran Status:** Yes
- Disabling Condition:** Yes
- Veteran Information:**
 - Military Branch:** Marines
 - Service Era:** Post September 11, 2001 (September 11, 2001 -Present)
 - Duration of Active Duty (Months):** 24
 - Discharge Status:** Honorable
 - Served War Zone:** Yes
- Prior Residence:** Identify the type of residence and length of stay at that residence just prior to (i.e., the night before) program admission.
 - Residence Prior to Program Entry:** Emergency shelter
 - Length Of Stay:** One to three months
- Prior Zip Code:** Enter the prior zip code of the apartment, room, or house where the client last lived for 90 days or more.
 - Prior Zip Code:** 46221
 - City:** Indianapolis
 - State:** IN
- Housing Status:** For each client, determine whether the client is: literally homeless; imminently losing their housing; unstably housed and at-risk of losing their housing; or in a stable housing situation.
 - Housing Status:** Literally Homeless
 - Continuously Homeless for a Year or More:** Yes
 - 4 Episodes of Homelessness in the Past 3 Years:** No
- Chronically Homeless Determination:** Based upon the assessment completed, the following determination has been made.
 - Chronically Homeless:** Yes
 - Restriction:** Restrict to Organization, Unrestricted

At the bottom right of the form, there are 'Save' and 'Pause' buttons.

You will now begin a series of required assessments that will finalize the household enrollment. Make

sure to properly check” **Yes or No**” for the Veteran Status and Disabling Condition. Certain logic is built into the system that will provide for additional drop down menu options based on the way in which certain client data is entered. Because this client is a veteran, additional questions are required to be answered.

Here is an example of the optional **Veteran Information**:



The screenshot shows a web form for 'Veteran Information'. At the top, there are two dropdown menus: 'Veteran Status:*' set to 'Yes' and 'Disabling Condition:*' set to 'No'. Below these is a section header 'Veteran Information'. Under this header, there are several fields: 'Military Branch:*' set to 'Marines', 'Service Era:' set to 'Post September 11, 2001 (September 11, 2001 -Present)', 'Duration of Active Duty (Months):' set to '24', 'Discharge Status:' set to 'Honorable', and 'Served War Zone:' with four radio buttons: 'Yes' (selected), 'No', 'Don't Know', and 'Refused'.

Assessment Date – Date the assessment was completed with the client (field will auto-fill with today’s date)

Residence Prior to Program Entry – Identify where the client was staying on **the night before** the client is enrolled in your program

Length of Stay – Identify the length of stay for the residence prior to program entry

Prior Zip Code – Remember this is the *zip code of the client’s last permanent residence of 90 days or more*. The system allows you to look up the zip code if the client knows the city, but not the specific zip code.

Click on the look up icon and type in the city and state and a list of potential matches will be displayed.

Choose one of the zip codes from list provided

Housing Status – Choose the appropriate category for the housing status of the household. More extensive definitions can be found by clicking the blue information circle next to the drop down box

HMIS Barriers Assessment

The built in logic may create additional fields that are required. All fields with a red * are required. If the client has no barriers, click on the No Barriers button in the lower right hand corner. Only select yes if barrier is present. It is important to keep in mind clients must have at least one barrier to be eligible for some programs (such as Shelter + Care). Click **“Save & Close”** when completed.

ClientTrack ESSENTIALS

Welcome Brennan Butler (Training)

Home Clients

SSN: 315-86-9789
Birth Date: 2/8/1980
ClientID: 909362

Ivy Flowers

Barriers

The selected clients barriers are displayed below. If the barrier has previously been identified, you can edit the barrier's information instead of adding another barrier of the same type.

Assessment Active

	Barrier	Help	Barrier Present?	Date Identified	Receiving Services / Treatment	Condition is Indefinite	Explanation
<input type="checkbox"/>	Alcohol Abuse	?	-- SELECT --				
<input type="checkbox"/>	Developmental Disability	?	-- SELECT --				
<input type="checkbox"/>	Drug Abuse	?	-- SELECT --				
<input type="checkbox"/>	HIV/AIDS	?	-- SELECT --				
<input type="checkbox"/>	Mental Health	?	-- SELECT --				
<input type="checkbox"/>	Physical Disability	?	-- SELECT --				
<input checked="" type="checkbox"/>	Chronic Health Condition		Yes	09/07/2012	Yes		

1

Save Save & Close No Barriers

Domestic Violence Assessment

Note that if you say "Yes" an additional field named "When Experience Occurred" will be required. Click "Save" when completed.

The screenshot displays the IHCDA ClientTrack ESSENTIALS web application. The browser address bar shows the URL: https://ihcdaonline.com/2012/MainPage.aspx?Inline=false. The application header includes the ClientTrack logo, a welcome message for Brennan Butler (Training), and navigation links for Home, Clients, Settings, Help, and Sign Out. The client's name, Ivy Flowers, and identifying information (SSN: 315-86-9789, Birth Date: 2/8/1980, ClientID: 909362) are visible at the top of the form area.

The left sidebar contains a navigation menu with the following sections:

- HUD Program Intake**
 - Basic Client Information
 - Family Members
 - Program Enrollment
 - Assessment
 - Barriers / Special Needs
 - Domestic Violence
 - Income
 - Non-Cash Benefits
- Case Management**
 - Client Dashboard
 - Edit Client
 - Family Members
 - Assessments
 - Enrollments
 - Services
 - Case Notes
 - Paused Workflows

The main content area is titled "Domestic Violence Assessment" and includes the instruction: "If the client has been a victim of domestic violence, select Yes for Domestic Violence Experience, and select when the experience occurred." Below this instruction is a button labeled "Default Client's Last Assessment".

The "Assessment Active" section contains the following fields:

- Assessment Date:** 09/07/2012
- Domestic Violence Experience :**
 - ☒ Yes
 - ☐ No
 - ☐ Don't Know
 - ☐ Refused
- When Experience Occurred :** Three to six months ago
- Restriction:**
 - ☐ Restrict to Organization
 - ☒ Unrestricted

At the bottom right of the form, there are "Save" and "Pause" buttons.

Financial Assessment Cash Benefits

An Income Assessment will be completed for EACH household member. You must answer the question of income received and non-cash benefits. **Note:** *Income received by a household member such as child support, TANF, WIC and food stamps should be designated on the assessment of the household member who directly receives payment.* If an adult receives a SSI or SSDI benefit on behalf of a child, that income should be designated on the income assessment of the child. It is very important that income (cash or non-cash) is properly designated on the proper client assessment.

Earned Income – Employment income

Other Income – Any income not previously listed

Unemployment Insurance – Unemployment benefits from the State

Private Disability Insurance – Non-government funded disability payments

Worker's Compensation – Income for individual who has been injured on the job

Self-Employment – Income earned by an individual who works for themselves

Supplemental Security Income – A federal program that provides additional income for older and disabled people with little to no income stream

Veteran's Disability Payment – Disability payment provided by the Department of Veteran's Affairs

Social Security Disability Income – A monthly compensation to individuals who can no longer work due to their medical conditions

Retirement (Social Security) – Income payment provided by government for individuals that qualify

Other Pension – Cash payment made from a private employer

Veteran's Pension – Cash payment made by the Department of Veteran's Affairs

Veteran's Disability Payment – A benefit paid to a veteran because of injuries or diseases that happened while on active duty, or were made worse by active duty

Child Support – Income received from one parent to another to care for children

TANF – Temporary Assistance for Needy Families

General Assistance – Cash from household or friends, trustee or church/non-profit

Click **"Save and Close"** when completed.

https://ihcdaonline.com/2012/MainPage.aspx?Inline=false

File Edit View Favorites Tools Help

http://www.in.gov-ihcda-f... IHCDA ClientTrack HMIS HelpDesk Unassign... Enterprise Rent-A-Car - R... RedDot Paychex eServices - Login

Welcome Brennan Butler (Training)

Settings Help Sign Out

ClientTrack ESSENTIALS

Home Clients

HUD Program Intake

- Basic Client Information
- Family Members
- Program Enrollment
- Assessment
- Barriers / Special Needs
- Domestic Violence
- Income
- Home Cash Benefits
- Work/Unemployment

Case Management

- Client Dashboard
- Role Client
- Family Members
- Assessments
- Enrollments
- Services
- Quick Services
- Standard Intake
- Client Services Report
- Case Notes
- Paused Workflows

Ivy Flowers SSN: 315-86-9789 Birth Date: 2/8/1980 ClientID: 805362

Financial Assessment

Indicate below the client's sources of monthly income/benefits.

Enter Expenses

Assessment Active

Assessment Date: 09/07/2012

Income Received: Yes

Non-cash Benefits: Yes

Income Group: Cash Income

15 records found.

Type	Description	Monthly Amount	Restriction
<input checked="" type="checkbox"/>	Earned Income	\$500.00	Unrestricted
<input type="checkbox"/>	Other Income		Unrestricted
<input type="checkbox"/>	Unemployment Insurance		Unrestricted
<input type="checkbox"/>	Private Disability Insurance		Unrestricted
<input type="checkbox"/>	Worker's Compensation		Unrestricted
<input type="checkbox"/>	Self Employment		Unrestricted
<input type="checkbox"/>	Supplemental Security Income		Unrestricted
<input type="checkbox"/>	Social Security Disability Income		Unrestricted
<input type="checkbox"/>	Retirement (Social Security)		Unrestricted
<input type="checkbox"/>	Other Pension		Unrestricted
<input type="checkbox"/>	Veteran's Pension		Unrestricted
<input type="checkbox"/>	Veteran's Disability Payment		Unrestricted
<input checked="" type="checkbox"/>	Child Support	200.00	Unrestricted
<input type="checkbox"/>	TANF		Unrestricted
<input type="checkbox"/>	General Assistance		Unrestricted

Count/Total Monthly Income: 2 \$700.00

Restriction: Restrict to Organization Unrestricted

Save Save and Close

Financial Assessment Non-Cash Benefits

This assessment is specific to individual – not the household in general. An assessment for non-cash benefits will be completed for each household member.

Food Stamps/Money for Food on Benefits Card – Monthly payments provided to individual in advance in a tax refund, Food Stamps (Snaps) – A stamp or coupon, issued by the government to persons with low incomes that can be redeemed for food at stores

MEDICAID – A joint federal and state program that helps low-income individuals or families pay for the costs associated with long-term medical and custodial care provided they qualify. Although largely funded by the federal government, Medicaid is run by the state where coverage may vary

MEDICARE – A federal program that pays for certain health care expenses for people aged 65 or older

Special Supplemental Nutrition Program for Women, Infants and Children (WIC) – A program geared toward supplying nutritional food for at risk pregnant women and their families.

Veteran's Administration Medical Services - Health care benefits and services provided for Veterans

Section 8, Public Housing or Other Rental Assistance – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development

Other Source – Any source not previously listed above.

Click “**Save and Close**” when completed.

https://ihcdaonline.com/2012/MainPage.aspx?Inline=false

File Edit View Favorites Tools Help

http://www.in.gov-ihcda-f... IHCDA ClientTrack HMIS HelpDesk Unassign... Enterprise Rent-A-Car - R... RedDot Paychex eServices - Login

Welcome Brennan Butler (Training)

Settings Help Sign Out

ClientTrack™

Home Clients

HUD Program Intake

- Basic Client Information
- Family Members
- Program Enrollment
- Assessment
- Barriers / Special Needs
- Domestic Violence
- Income
- Non-Cash Benefits

Case Management

- Client Dashboard
- Edit Client
- Family Members
- Assessments
- Enrollments
- Services
- Case Notes
- Paused Workflows

Ivy Flowers SSN: 315-86-9789 Birth Date: 2/8/1980 ClientID: 909362

Financial Assessment

Indicate below the client's sources of **monthly** income/benefits.

Enter Expenses

Assessment Active

Assessment Date: 09/07/2012

Income Received: Yes

Non-cash Benefits: Yes

Income Group: Non-cash Benefit

7 records found.

Type	Description	Monthly Amount	Restriction
<input checked="" type="checkbox"/>	Food Stamps/Money for food on benefits card	\$300.00	Unrestricted
<input checked="" type="checkbox"/>	MEDICAID		Unrestricted
<input type="checkbox"/>	MEDICARE		Unrestricted
<input type="checkbox"/>	Special Supplemental Nutrition Program for Women, Infants, and Children		Unrestricted
<input type="checkbox"/>	Veteran's Administration Medical Services		Unrestricted
<input type="checkbox"/>	Section 8, Public Housing, or Other Rental Assistance		Unrestricted
<input type="checkbox"/>	Other Source		Unrestricted

Count/Total Monthly Income: 2 \$300.00

Restriction: ☐ Restrict to Organization ☒ Unrestricted

Save Save and Close

Employment Assessment

When filling out the Employment Assessment keep in mind the built in logic may require you to fill out additional information. Click **"Save"** when completed.

The screenshot displays the IHCDA ClientTrack ESSENTIALS web application. The browser address bar shows the URL: https://ihcdaonline.com/2012/MainPage.aspx?Inline=false. The application header includes the ClientTrack logo, a welcome message for Brennan Butler (Training), and navigation links for Home, Clients, Settings, Help, and Sign Out. The left sidebar contains a navigation menu with options like HUD Program Intake, Assessment, Case Management, and various assessment categories (Barriers / Special Needs, Domestic Violence, Income, Non-Cash Benefits, Employment, Education, Health). The main content area is titled 'Employment Assessment' and includes a client profile for Ivy Flowers (SSN: 315-86-9789, Birth Date: 2/8/1980, ClientID: 909362). The form contains the following fields:

- Assessment Date: 09/07/2012
- Employed?: Yes
- Hours Worked In Last Week: 20.00
- Employment Tenure: Permanent
- Looking for additional employment / increased hours: Yes
- Restriction: ☒ Unrestricted (with an option to Restrict to Organization)

Buttons for 'Default Last Assessment', 'Save', and 'Pause' are visible at the bottom of the form.

Adult Education Assessment

When filling out the Adult Education Assessment, remember certain answers will prompt the built in logic to require more information. Please note that if a client has had some secondary education, but has received a

degree you should select **“Post-Secondary School”** and the select **“None”** in the Secondary Education box. Click **“Save”** to continue.

The screenshot displays the IHCDA ClientTrack Training web application. The browser address bar shows the URL <https://ihcdaonline.com/2012/MainPage.aspx?Inline=false>. The application header includes a welcome message for Brennan Butler (Training) and navigation links for Home, Clients, Settings, Help, and Sign Out. The left sidebar contains a navigation menu with options like HUD Program Intake, Assessment, Case Management, and Client Dashboard. The main content area is titled 'Adult Education Assessment' and includes instructions: 'Indicate if the client is enrolled in an education or training program or working toward a degree at the time of assessment. Indicate if the client has completed vocational training or received an apprenticeship. Select Highest Grade Completed. If the client has completed a high school diploma or above, select the secondary education degree(s) the client has earned.' The form fields are as follows: 'Assessment Date' is 09/07/2012; 'Currently in School / Working on Degree' is Yes; 'Received Vocational Training/Apprenticeship' is Yes; 'Highest Grade Completed' is Post-secondary school; 'Secondary Education' is a dropdown menu with options: None, Associates Degree, Bachelors (selected), Masters, Doctorate, and Other graduate/professional degree; 'Restriction' has radio buttons for 'Restrict to Organization' and 'Unrestricted' (selected). A 'Default Last Assessment' button is located above the form fields. At the bottom right, there are 'Save' and 'Pause' buttons.

Health Assessment

Note: (Female Only) If you say “Yes” to the Pregnancy Status, it will ask you for the Due Date of the unborn child. Click **“Save”** when completed.

Browser: https://ihcdaonline.com/2012/MainPage.aspx?Inline=false

Client: Ivy Flowers SSN: 315-86-9789 Birth Date: 2/8/1980 ClientID: 909362

Health Assessment

Select the appropriate general health status. If the client is female, you will need to select the appropriate pregnancy status. If the client is pregnant, you will need to record the due date.

Default Last Assessment

Assessment Active

Assessment Date: * 09/07/2012

General Health Status: * Excellent

Pregnancy Status: *

- ☐ Yes
- ☒ No
- ☐ Don't Know
- ☐ Refused

Restriction: *

- ☐ Restrict to Organization ?
- ☒ Unrestricted

Buttons: Save, Pause

Enrollment process for Child and/or other Household Member

Click the “Yes” button.

The screenshot displays the IHCDA ClientTrack Training web application. The browser address bar shows the URL <https://ihcdaonline.com/2012/MainPage.aspx?Inline=false>. The page header includes the ClientTrack logo and a welcome message for Brennan Butler (Training). The left sidebar contains a navigation menu with sections: HUD Program Intake (Basic Client Information, Family Members, Program Enrollment, Assessment, Lily Flowers, Enroll Family Member?), Case Management (Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Case Notes, Paused Workflows), and Case Management. The main content area shows a confirmation dialog titled "Enroll Family Member?" with the question "Do you wish to enroll Lily Flowers into the program?". Below the question are two radio buttons: "Yes" (selected) and "No". The client information for Lily Flowers is displayed: SSN: 315-86-9789, Birth Date: 2/8/1990, ClientID: 909362.

Universal Data Assessment

Assessment Date – Date the assessment was completed with the client (field will auto-fill with today's date)

Veteran Status – Identify if this client is a Veteran, if you select “Yes” additional information will be required

Disabling Condition – Identify if this client has any disabilities

Residence Prior to Program Entry – Identify where the client was staying on the night before the client is enrolled in your program

Length of Stay – Identify the length of stay for the residence prior to program entry

Prior Zip Code – Remember this is the *zip code of the client’s last permanent residence of 90 days or more.*

The system allows you to look up the zip code if the client knows the city, but not the specific zip code. Click on the look up icon and type in the city and state and a list of potential matches will be displayed. Choose one of the zip codes from list provided.

Housing Status – Choose the appropriate category for the housing status of the household. More extensive definitions can be found by clicking the blue information circle next to the drop down box.

Chronic Homeless Assessment - In order for a client to be chronically homeless, they must be unaccompanied; and continually homeless for a year or more or 4 episodes of homelessness in a 3 year period; and have a substance abuse disorder, serious mental illness, developmental disability or a chronic physical illness or disability. When the qualifying conditions are checked appropriately, the system will indicate the client’s status of chronically homeless.

Once the Universal Data Assessment is completed, click “**Save**”.

https://ihcdaonline.com/2012/MainPage.aspx?Inline=false IHCDA ClientTrack Training Indiana Housing & Commu...

File Edit View Favorites Tools Help

http://www.in.gov-ihcda-f... IHCDA ClientTrack HMIS HelpDesk Unassign... Enterprise Rent-A-Car - R... RedDot Paychex eServices - Login

Welcome Brennan Butler (Training)

Settings Help Sign Out V. 2012

ClientTrack

Home Clients

SSN: 235-97-8678
Birth Date: 8/1/2005
ClientID: 909363

Lily Flowers

HUD Program Intake

- Basic Client Information
- Family Members
- Program Enrollment
- Assessment
- Lily Flowers
- Enroll Family Member?
- Assessment

Case Management

- Client Dashboard
- Edit Client
- Family Members
- Assessments
- Enrollments
- Services
- Quick Services
- Standard Intake
- Client Services Report
- Case Notes
- Paused Workflows

Universal Data Assessment

Complete the information below related to the selected client's housing status and other relevant information.

Default Information From Head of Household

Assessment Date: 09/07/2012

Age at Assessment: 7

Assessment Type: Entry

Program: Aurora - Shelter Plus Care Program (PH-R12-82)

Assessor: Brennan Butler

Veteran Status: No

Disabling Condition: No

Prior Residence - Identify the type of residence and length of stay at that residence just prior to (i.e., the night before) program admission.

Residence Prior to Program Entry: Emergency shelter

Length Of Stay: One to three months

Prior Zip Code - Enter the prior zip code of the apartment, room, or house where the client last lived for 90 days or more.

Prior Zip Code: 46221

City: Indianapolis

State: IN

Housing Status - For each client, determine whether the client is: literally homeless; imminently losing their housing; unstably housed and at-risk of losing their housing; or in a stable housing situation.

Housing Status: Literally Homeless

Continuously Homeless for a Year or More: ☐

4 Episodes of Homelessness in the Past 3 Years: ☐

Chronically Homeless Determination - Based upon the assessment completed, the following determination has been made.

Chronically Homeless: No

Restriction: ☐ Restrict to Organization ☒ Unrestricted

Save Pause

HMIS Barriers

The built in logic may create additional fields that are required. All fields with a red * are required. If the client has no barriers, click on the No Barriers button in the lower right hand corner. It is important to keep in mind that clients must have at least one barrier to be eligible for some programs (such as Shelter + Care). Click **“Save & Close”** when completed.

ClientTrack ESSENTIALS

Welcome Brennan Butler (Training)

Home Clients

SSN: 235-97-8678
Birth Date: 6/1/2005
ClientID: 909363

Lily Flowers

Barriers

The selected clients barriers are displayed below. If the barrier has previously been identified, you can edit the barrier's information instead of adding another barrier of the same type.

Assessment Active

Barrier	Help	Barrier Present?	Date Identified	Receiving Services / Treatment	Condition is Indefinite	Explanation
Alcohol Abuse	?	-- SELECT --				
Developmental Disability	?	-- SELECT --				
Drug Abuse	?	-- SELECT --				
HIV/AIDS	?	-- SELECT --				
Mental Health	?	-- SELECT --				
Physical Disability	?	-- SELECT --				
Chronic Health Condition		-- SELECT --				

0

Save Save & Close No Barriers

Financial Assessment Cash Benefits

Remember this is the financial assessment for the second household member (and in this case, a child). Children are typically only going to have minimal options on this list such as SSI (death benefits). TANF, Food Stamps and Child Support remain as income for the parent/guardian – not the child.

Earned Income – Employment income

Other Income – Any income not previously listed

Unemployment Insurance – Unemployment benefits from the State

Private Disability Insurance – Non-government funded disability payments

Worker's Compensation – Income for individual who has been injured on the job

Self-Employment – Income earned by an individual who works for themselves

Supplemental Security Income – A federal program that provides additional income for older and disabled people with little to no income stream

Veteran's Disability Payment – Disability payment provided by the Department of Veteran's Affairs

Social Security Disability Income – A monthly compensation to individuals who can no longer work due to their medical conditions

Retirement (Social Security) – Income payment provided by government for individuals that qualify

Other Pension – Cash payment made from a private employer

Veteran's Pension – Cash payment made by the Department of Veteran's Affairs

Veteran's Disability Payment – A benefit paid to a veteran because of injuries or diseases that happened while on active duty, or were made worse by active duty

Child Support – Income received from one parent to another to care for children

TANF – Temporary Assistance for Needy Families

General Assistance – Cash from household or friends, trustee or church/non-profit

Click **"Save and Close"** when completed.

https://ihcdaonline.com/2012/MainPage.aspx?Inline=false IHCDA ClientTrack Training Indiana Housing & Commu...

File Edit View Favorites Tools Help

http://www.in.gov-ihcda-f... IHCDA ClientTrack HMIS HelpDesk Unassign... Enterprise Rent-A-Car - R... RedDot Paychex eServices - Login

Welcome Brennan Butler (Training) Settings Help Sign Out

ClientTrack ESSENTIALS

HUD Program Intake Assessment

Lily Flowers SSI: 235-97-8678 Birth Date: 6/1/2005 ClientID: 909363

Financial Assessment

Indicate below the client's sources of **monthly** income/benefits.

Assessment Active

Assessment Date: 09/07/2012

Income Received: No

Non-cash Benefits: No

Income Group: Cash Income

15 records found.

Type	Description	Monthly Amount	Restriction
<input type="checkbox"/>	Earned Income		Unrestricted
<input type="checkbox"/>	Other Income		Unrestricted
<input type="checkbox"/>	Unemployment Insurance		Unrestricted
<input type="checkbox"/>	Private Disability Insurance		Unrestricted
<input type="checkbox"/>	Worker's Compensation		Unrestricted
<input type="checkbox"/>	Self Employment		Unrestricted
<input type="checkbox"/>	Supplemental Security Income		Unrestricted
<input type="checkbox"/>	Social Security Disability Income		Unrestricted
<input type="checkbox"/>	Retirement (Social Security)		Unrestricted
<input type="checkbox"/>	Other Pension		Unrestricted
<input type="checkbox"/>	Veteran's Pension		Unrestricted
<input type="checkbox"/>	Veteran's Disability Payment		Unrestricted
<input type="checkbox"/>	Child Support		Unrestricted
<input type="checkbox"/>	TANF		Unrestricted
<input type="checkbox"/>	General Assistance		Unrestricted

Count/Total Monthly Income: 0 \$0.00

Restriction: ☐ Restrict to Organization ☒ Unrestricted

Save Save and Close

Financial Assessment Non-Cash Benefits

This section is specific to individual, not the household. An Income Assessment will be completed for each household member. Again, there are limited selections which will pertain to children (Medicaid).

Food Stamps/Money for Food on Benefits Card – Monthly payments provided to individual in advance in a tax refund, Food Stamps (Snaps) – A stamp or coupon, issued by the government to persons with low incomes that can be redeemed for food at stores

MEDICAID – A joint federal and state program that helps low-income individuals or families pay for the costs associated with long-term medical and custodial care provided they qualify. Although largely funded by the federal government, Medicaid is run by the state where coverage may vary

MEDICARE – A federal program that pays for certain health care expenses for people aged 65 or older

Special Supplemental Nutrition Program for Women, Infants and Children (WIC) – A program geared toward supplying nutritional food for at risk pregnant women and their families

Veteran's Administration Medical Services - Health care benefits and service provided for Veterans

Section 8, Public Housing or Other Rental Assistance – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development

Other Source – Any source not previously listed above

Click “**Save and Close**” when completed.

https://ihcdaonline.com/2012/MainPage.aspx?Inline=false

File Edit View Favorites Tools Help

http--www.in.gov-ihcda-f... IHCD ClientTrack HMIS HelpDesk Unassign... Enterprise Rent-A-Car - R... RedDot Paychex eServices - Login

Welcome Brennan Butler (Training)

Settings Help Sign Out

ClientTrack

Home Clients

HUD Program Intake

- Basic Client Information
- Family Members
- Program Enrollment
- Assessment
 - Barriers / Special Needs
 - Domestic Violence
 - Income
 - Non-Cash Benefits
 - Child Education

Case Management

- Client Dashboard
- Edit Client
- Family Members
- Assessments
- Enrollments
- Services
- Case Notes
- Paused Workflows

Lily Flowers SSN: 235-97-8678
Birth Date: 6/1/2005
ClientID: 909363

Financial Assessment

Indicate below the client's sources of **monthly** income/benefits.

[Enter Expenses](#)

Assessment Active

Assessment Date: 09/07/2012

Income Received: No

Non-cash Benefits: No

Income Group: Non-cash Benefit

7 records found.

Type	Description	Monthly Amount	Restriction
<input type="checkbox"/>	Food Stamps/Money for food on benefits card		Unrestricted
<input type="checkbox"/>	MEDICAID		Unrestricted
<input type="checkbox"/>	MEDICARE		Unrestricted
<input type="checkbox"/>	Special Supplemental Nutrition Program for Women, Infants, and Children		Unrestricted
<input type="checkbox"/>	Veteran's Administration Medical Services		Unrestricted
<input type="checkbox"/>	Section 8, Public Housing, or Other Rental Assistance		Unrestricted
<input type="checkbox"/>	Other Source		Unrestricted

Count/Total Monthly Income: 0 \$0.00

Restriction: ☐ Restrict to Organization ☒ Unrestricted

[Save](#) [Save and Close](#)

Child Education Assessment

Enter the **"Highest Grade Completed"** for the child, and then select if the child is **"Currently Enrolled in School"**. The built in logic may require further information depending on how you answer the questions. Click

“Save” when completed.

The screenshot displays the IHCDA ClientTrack web application interface. The browser address bar shows the URL <https://ihcdaonline.com/2012/MainPage.aspx?Inline=false>. The application header includes the ClientTrack logo, a welcome message for Brennan Butler (Training), and navigation links for Home and Clients. A sidebar on the left contains a 'HUD Program Intake' section with a circular flow diagram and a 'Case Management' section with a list of links including Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Case Notes, and Paused Workflows. The main content area is titled 'Child Education Assessment' and includes a 'Default Last Assessment' button. The form contains the following fields and options:

- Assessment Date: 09/07/2012
- Highest Grade Completed: Nursery School to 4th Grade
- Current Enrollment Status: ☒ Yes, ☐ No, ☐ Don't Know, ☐ Refused
- Type of School: Public School
- School Name: IPS 56
- Connected with McKinney-Vento School Liaison?: Yes
- Comments: (text area)
- Restriction: ☐ Restrict to Organization, ☒ Unrestricted

At the bottom right of the form, there are 'Save' and 'Pause' buttons.

Health Assessment

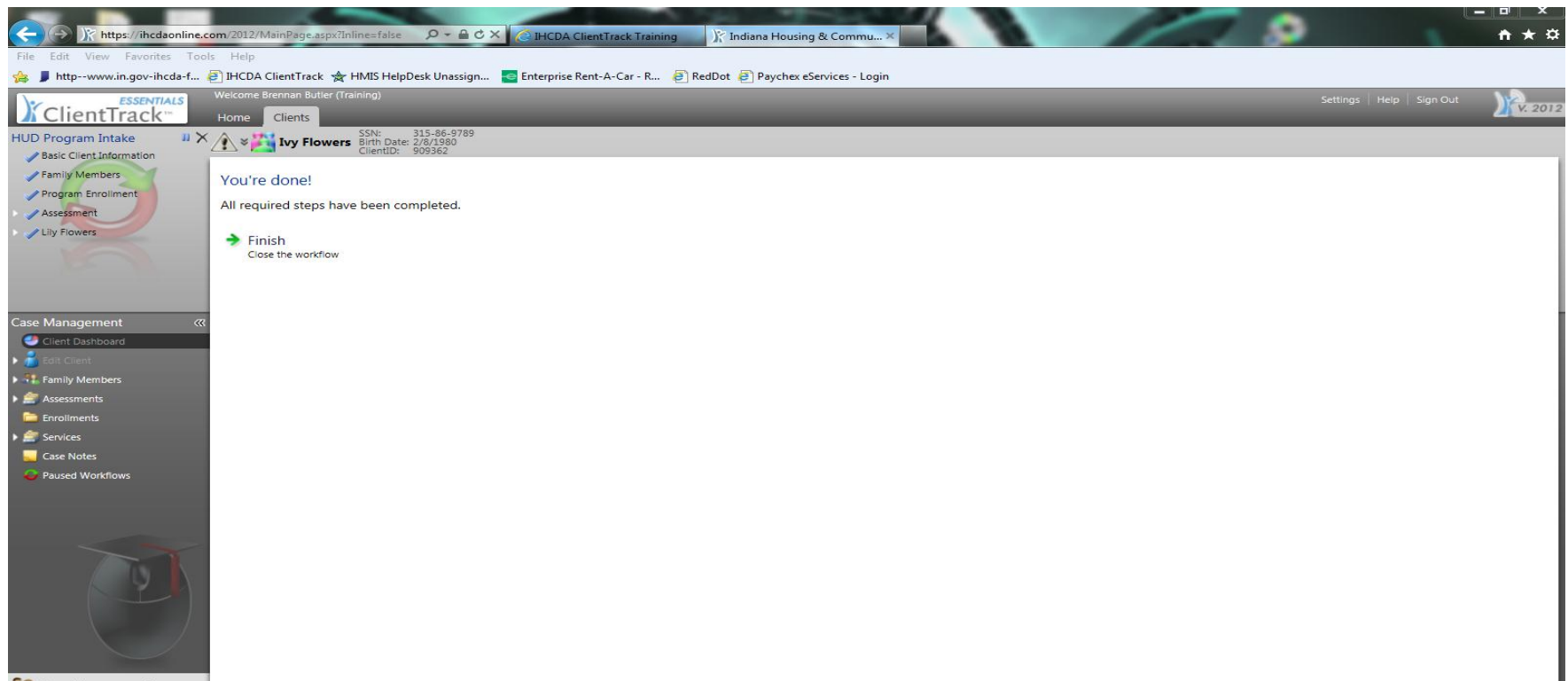
The answer to this question is up to the client or the parent of the client. If you notice that they are not as they describe, then you would want to note that in your case notes. Click “Save” when completed.

The screenshot displays the IHCDA ClientTrack Training web application. The browser address bar shows the URL <https://ihcdaonline.com/2012/MainPage.aspx?Inline=false>. The page header includes navigation links for Home, Clients, and a user profile for Brennan Butler (Training). The main content area is titled "Health Assessment" and includes a sub-header "Select the appropriate general health status. If the client is female, you will need to select the appropriate pregnancy status. If the client is pregnant, you will need to record the due date." Below this, there is a "Default Last Assessment" button and a section labeled "Assessment Active". The form fields are as follows:

Field	Value
Assessment Date	09/07/2012
General Health Status	Excellent
Restrictions	<input type="radio"/> Restrict to Organization <input checked="" type="radio"/> Unrestricted

The left sidebar contains a "Case Management" section with links to Client Dashboard, Case Client, Family Members, Assessments, Enrollments, Services, Case Notes, and Paused Workflows. The bottom right corner of the form has "Save" and "Pause" buttons.

All steps for the assessment and enrollment process have been completed. Upon clicking the **“Finish”** button, you will be redirected to the Dashboard for the Head of Household. It is from this screen you will begin to add services and case notes regarding the HMIS Program Enrollment.



Tech Note

Household member icons are color-coded

Adult male household members have a blue icon

Adult female household members have a pink icon

Children have a green icon

The Client Dashboard

The Client Dashboard provides you with a great deal of information regarding the client. You can verify the basic client demographics, see the enrollment in a particular program, number of case members, enrollment date, the associated organization and when their last Assessment has been completed. It will also provide you with an “at a glance” look at the services the client has received.

While you will have the option on many screens for a “Don’t Know or Refused” option – which may be valid at time of intake – it is expected that as information is collected during the program enrollment the client information/assessments will be updated. The screen shots that follow will help you access a previously completed assessment should you need to make corrections.

ClientTrack ESSENTIALS

Welcome Brennan Butler (Training)

Home Clients

Search Menu

Find Client

Intake Workflow

Case Management

Client Dashboard

Edit Client

Family Members

Assessments

Enrollments

Services

Case Notes

Paused Workflows

Ivy Flowers's Dashboard

Ivy Flowers's Information

Name: Flowers, Ivy Birth Date: 2/8/1980 Age: 32

Gender: Female Disabling Condition: No Veteran: Yes

Ethnicity: Non-Hispanic/Latino Race: Asian

Photo

Ivy's Enrollments

Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
Current							
Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82)	2	09/07/2012		Aurora Inc	09/07/2012	1509937	

Ivy's Case Manager Assignments

Case Manager	Begin Date	Status	End Date	Enrollment
Brennan Butler	09/07/2012	Active		Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82)

Ivy's Services

Date	Service	Units	\$ Total	Organization
------	---------	-------	----------	--------------

Click on the **“Enrollment”** menu item on the left, or you can click on the **“Blue Bar”** that says **“Client Name Enrollments”**. Choose the enrollment that needs to be edited and click on the **“Blue Play Button”** to produce a drop down menu. You can either Edit Enrollment (maybe the date needs to be changed, name is misspelled, etc.) View Case Members, Case Summary Report, Perform During Program Enrollment Assessment or Exit the Enrollment.

ClientTrack ESSENTIALS

Welcome Brennan Butler (Training)

Home Clients

Search Menu

Find Client

Intake Workflow

Case Management

Client Dashboard

Edit Client

Family Members

Assessments

Enrollments

Services

Case Notes

Paused Workflows

Ivy Flowers SSN: 315-86-9789 Birth Date: 2/8/1980 ClientID: 909362

Ivy Flowers's Dashboard Enrollments

All of client's enrollments display below. An enrollment represents a defined period of participation in a grant and/or program. From here, you can enroll a client in a program, exit them from an existing program or perform annual assessment updates.

1 record found.

Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
Current Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82)	2	09/07/2012		Aurora Inc	09/07/2012	1509937	

- Edit Enrollment
- View Case Members
- Case Summary Report
- Review Entry Assessments
- Perform During Program Enrollment Assessment
- Exit the Enrollment

Case Management

Cancel

Click on **“Blue Play Button”** and then click on **“Review Entry Assessments”** in the drop down list.

ClientTrack ESSENTIALS V. 2012

Welcome Brennan Butler (Training)

Home Clients Settings Help Sign Out

SSN: 315-86-9789
Birth Date: 2/8/1980
ClientID: 909362

Ivy Flowers's Dashboard > Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82) > Assessment Status

Displayed below is the status of the Assessment.

Assessment	Finished
HMIS Universal Data	✓
Chronic Homelessness	✓
HMIS Barriers	✓
Domestic Violence	✓
Financial	✓
Employment (Adult Only)	✓
Adult Education	✓
Child Education	✓
Health	✓
Veteran Assessment (Adult Only)	✓

Edit Assessment

Close

As you can see when you select “Review Entry Assessments”, all required assessment have been completed. For instance, if a client does not disclose at entry they are receiving food stamps but you find out soon after their enrollment, you would want to **EDIT** the Financial Assessment (To “**Edit**” an assessment click on the

“Notepad with the Green Pencil”, put in the updated information. Click “Save”). However, if the client BEGAN receiving Food Stamps while enrolled in your program (1-2 months later); **DO NOT** edit the entry assessment. This is a time to complete a “During Program Enrollment Assessment.” (This will be covered later in the manual)

Adding Services

The screenshot displays the IHCDA ClientTrack Training interface. The browser address bar shows the URL: <https://ihcdaonline.com/2012/MainPage.aspx?Inline=false>. The page title is "IHCDA ClientTrack Training". The interface includes a navigation menu on the left with options like "Home", "Clients", "Search Menu", "Find Client", "Intake Workflow", "Case Management", "Client Dashboard", "Edit Client", "Family Members", "Assessments", "Enrollments", "Services", "Case Notes", and "Paused Workflows". The main content area shows the "Ivy Flowers's Dashboard" for a client named Ivy Flowers. The dashboard includes sections for "Ivy Flowers's Information", "Ivy's Enrollments", "Ivy's Case Manager Assignments", and "Ivy's Services".

Ivy Flowers's Information

Name:	Flowers, Ivy	Birth Date:	2/8/1980	Age:	32
Gender:	Female	Disabling Condition:	No	Veteran:	Yes
Ethnicity:	Non-Hispanic/Latino	Race:	Asian		

Ivy's Enrollments

Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
Current							
Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82)	2	09/07/2012		Aurora Inc	09/07/2012	1509937	

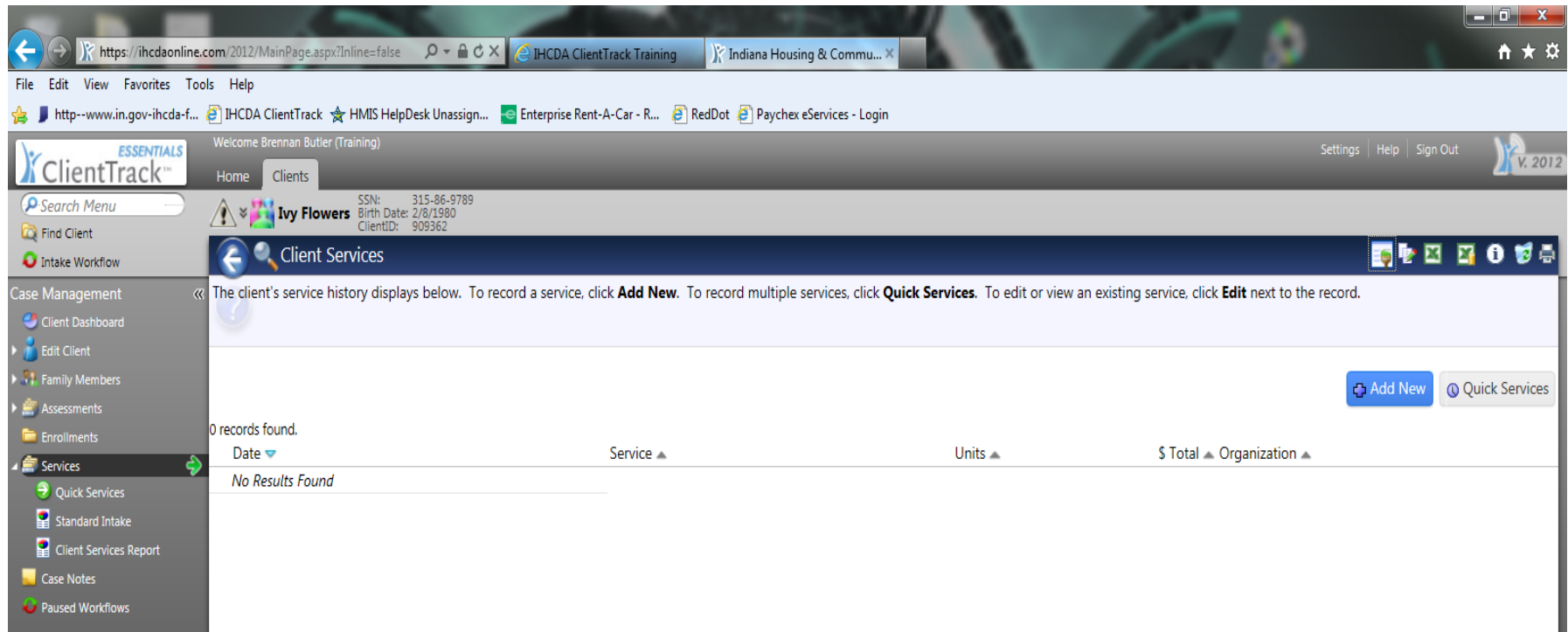
Ivy's Case Manager Assignments

Case Manager	Begin Date	Status	End Date	Enrollment
Brennan Butler	09/07/2012	Active		Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82)

Ivy's Services

Date	Service	Units	\$ Total	Organization
------	---------	-------	----------	--------------

To add services go to the left hand menu items, and then click on the “**Services**” link, this will open the Services Window.



Click on the “**Add New**” Button

NOTE – You will have the option to Add Quick Services (for use when you are adding multiple services for a client that were performed on the same day). For services that may require some additional information, use the Add New button.

You now see the **Services Screen**, you will need to **select your grant, enrollment, and the service provided**. You can also enter units to track costs. The comments section can be used for reminders; however, this is not the area to write your case notes. Case Notes will be covered later in the manual. When you are

finished documenting services click on the **“Save”** Button.

The screenshot shows the IHCD ClientTrack Training web application. The user is logged in as Brennan Butler (Training). The interface includes a navigation menu on the left with options like Search Menu, Find Client, Intake Workflow, Case Management, Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Quick Services, Standard Intake, Client Services Report, Case Notes, and Paused Workflows. The main content area is titled 'Service' and contains a form for entering service information. The form includes a table for Family Income, fields for Grant, Enrollment, Service, Provider, Location, Date, Units, Unit Value, Total, User Performing the Service, Comments, and Restriction. The 'Save' button is visible at the bottom right.

Family Income:

Income	Family Income	Family Members	Poverty Level	% of Poverty
\$1,800.00	\$1,800.00	2	\$1,260.83	142.76 %

Grant: * Aurora - SPC (R12)

Enrollment: * 09/07/2012 - Aurora - Shelter Plus Care Program (PH-R12-82)

Service: * Case/Care Management

Provider:

Location: Aurora Inc - Main

Date: * 09/07/2012

Units: * 1.00

Unit Value: * \$0.00

Total: \$0.00

User Performing the Service: Brennan Butler

Comments:

Restriction: * ☐ Restrict to Organization ☒ Unrestricted

Buttons: Save, Pause, Cancel

Once you have clicked on the **“Save”** Button, you will be brought back to the Service home screen, from here you are able to edit or delete a service that you provided.

ClientTrack ESSENTIALS

Welcome Brennan Butler (Training)

Home Clients

Search Menu

Find Client

Intake Workflow

Case Management

Client Dashboard

Edit Client

Family Members

Assessments

Enrollments

Services

Quick Services

Standard Intake

Client Services Report

Case Notes

Paused Workflows

SSN: 315-86-9789

Birth Date: 2/8/1980

ClientID: 909362

Ivy Flowers

Client Services

The client's service history displays below. To record a service, click **Add New**. To record multiple services, click **Quick Services**. To edit or view an existing service, click **Edit** next to the record.

1 record found.

Date	Service	Units	\$ Total	Organization
09/07/2012	Case/Care Management	1.00	\$0.00	Aurora Inc

Add New Quick Services

Quick Services

When you are adding more than one service on a client, the easiest way will be to use the “**Quick Services**” Button located at the top right corner of your screen next to the “Add New” button. With this feature you will be able to add multiple services to a client at one time. You will need to select your “**Grant and Enrollment**”, as well as the “**Check Box**” next to the Service you provided. Once you are finished adding services click on the “**Save and Close**” Button.

13 records found.

Service*	Units*	Unit Value*	Total	EndDate	Comments	Help
Case/Care Management	1.00	\$0.00	\$0.00			
Child Care	1.00	\$0.00	\$0.00			
Education	1.00	\$0.00	\$0.00			
Employment	1.00	\$0.00	\$0.00			
HIV/AIDS-Related Services	1.00	\$0.00	\$0.00			
Housing Placement	1.00	\$0.00	\$0.00			
Legal Services	1.00	\$0.00	\$0.00			
Life Skills	1.00	\$0.00	\$0.00			
Mental Health Care/Counseling	1.00	\$0.00	\$0.00			
Other	1.00	\$0.00	\$0.00			
Other Healthcare Services	1.00	\$0.00	\$0.00			
Outreach	1.00	\$0.00	\$0.00			
Transportation	1.00	\$0.00	\$0.00			
	0.00	\$0.00	\$0.00			

Case Notes

Timely and robust case notes assist you and other case managers at your organization in serving your clients. It is extremely important that meetings, calls and other relevant information regarding your client are properly documented in their case notes.

To add Case Notes, click on the **“Case Notes”** Menu Item on the left of the screen. Click on the **“Add New”**

button on the upper right hand side of the screen. Remember, these case notes will be restricted to case managers in your organization so if you are apt to use abbreviations, make sure others in your agency will be able to decipher what you have written. While ClientTrack™ will eventually provide a date in the body of the case note; it is also good practice to add the date in your case note.

The screenshot displays the IHCDA ClientTrack Training web application. The browser address bar shows the URL <https://ihcdaonline.com/2012/MainPage.aspx?Inline=false>. The application header includes a search menu, a welcome message for Brennan Butler (Training), and navigation links for Home, Clients, Settings, Help, and Sign Out. The left sidebar contains a search menu and a list of navigation items: Case Management, Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Quick Services, Standard Intake, Client Services Report, Case Notes, and Paused Workflows. The main content area is titled "Client Case Notes" and displays a message: "The client's case note history displays below. To create a new case note, click **Add New**. To view or edit a case note, click **Edit Case Note** next to the record. To preview and print case notes, check the Print box next to one or more case notes, and then click **Print Selected**." Below this message, there are buttons for "Add New" and "Print Selected". A table header is visible with columns: "Print", "Date", "Regarding", "User", and "Organization". The table currently shows "0 records found." and "No Results Found". The bottom of the screen features a "Case Management" link and a "Cancel" button.

Here is an example of Case Notes:

The screenshot displays the IHCDA ClientTrack Training web application. The browser address bar shows the URL: <https://ihcdaonline.com/2012/MainPage.aspx?Inline=false>. The page header includes the ClientTrack logo and a welcome message for Brennan Butler (Training). The left sidebar contains a navigation menu with options like Case Management, Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Quick Services, Standard Intake, Client Services Report, Case Notes, and Paused Workflows. The main content area is titled "Client Case Notes" and "Case Note". It includes a form for entering a case note with fields for Entry Date (09/07/2012), User (Brennan Butler), and Regarding (Client Enrollment). The template is set to "Case Note". The text area contains the following content:

Complete case note **Entry Date**. Verify the **User** recording the note. Enter a brief title or description for the note in **Regarding**. Complete the case note in the text editor field. If **Read Only** is checked, no one will be able to delete or edit the case note unless the read only checkbox has been unchecked.

Met with client and daughter. Completed client interview and case management enrollment, both members are now in program. Family has been impacted by the father leaving. Deceased was primary bread winner therefore leaving the family with minimal income, however, they have just started receiving child support. Family has been evicted from apartment and will reside in shelter.

Client will work with job coach to obtain employment
Client will meet with counselor

Client Name: Ivy Flowers

At the bottom of the screen, there are buttons for Design, HTML, Preview, Read Only, Restriction (Restrict to Organization, Unrestricted), Save, Pause, and Cancel.

Once you have added your Case Notes click on the “**Save**” button at the bottom of the screen. You will be re-directed to the Case Notes screen, where you will be able to print, edit, or delete your case notes.

The screenshot shows a web browser window with the URL <https://ihcdaonline.com/2012/MainPage.aspx?Inline=false>. The browser's address bar and tabs are visible at the top. Below the browser window, the ClientTrack interface is displayed. The top navigation bar includes links for Home, Clients, and a search menu. The main content area is titled 'Client Case Notes' and displays a message: 'The client's case note history displays below. To create a new case note, click **Add New**. To view or edit a case note, click **Edit Case Note** next to the record. To preview and print case notes, check the Print box next to one or more case notes, and then click **Print Selected**.' Below this message, a table shows the case note history. The table has columns for 'Print', 'Date', 'Regarding', 'User', and 'Organization'. A single record is found, dated 09/07/2012, regarding 'Client Enrollment', created by 'Brennan Butler', and associated with 'Aurora Inc'. The 'Print' column for this record contains a checkbox. To the right of the table, there are buttons for 'Add New' and 'Print Selected'.

Print	Date	Regarding	User	Organization
<input type="checkbox"/>	09/07/2012	Client Enrollment	Brennan Butler	Aurora Inc

During Program Assessment

For clients that spend longer periods of time in your program, you now have access to a “During Program Assessment”. This assessment is now required if you have clients in your program for a year or longer. You may also want to complete this assessment if you have a new member (birth of a child) to the household or if someone in the household departs (divorce) your program. You can also use this workflow to track and maintain significant changes to a household income, etc. For your convenience, the assessment has been developed as a workflow with the following steps:

To perform a During Program Assessment click on either the **“Enrollments”** link on the left hand menu area, or you can click on the blue bar that says **“Client Name Enrollments”**, either of these will take you to the Enrollments screen.

The screenshot shows the IHCDA ClientTrack Training interface. The top navigation bar includes links for Home, Clients, and a search bar. The sidebar on the left contains a 'Case Management' section with links to Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Case Notes, and Paused Workflows. The main content area displays 'Ivy Flowers's Dashboard' and 'Enrollments'. A table lists enrollments with columns for Enrollment Description, Case Members, Enroll Date, Exit Date, Organization, Last Assessment Completed, Enroll ID, and Exit ID. One record is shown for 'Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82)' with 2 case members and an enrollment date of 09/07/2012. A context menu is open over this record, showing options: Edit Enrollment, View Case Members, Case Summary Report, Review Entry Assessments, Perform During Program Enrollment Assessment, and Exit the Enrollment.

Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82)	2	09/07/2012		Aurora Inc	09/07/2012	1509937	

Click the **“Blue Play Button”**, and then click on **“Perform During Program Enrollment Assessment”**, this will launch a During Program Enrollment Assessment Workflow. For your convenience, the assessment has been developed as a workflow with the following steps (For further instructions look back at Enrolling a client):

1. Verify and make any necessary changes to basic client information
2. Verify and make any necessary changes to household information
3. Master Assessment-During Program Enrollment is completed
 - a. Review of HMIS Barriers
 - b. Financial Assessment (Cash and Non-cash)
 - c. Employment Assessment
 - d. Education Assessment
 - e. Health Assessment
 - f. Perform Household Members Assessments
4. Click “**Finish**” and you will be redirected to the Client Dashboard

Exit Client

To “**Exit**” a client from the program/enrollment, you can either click on the “**Enrollments**” link on the left hand menu bar, or you can click on the blue bar that says “**Client Name Enrollments**”. This will take you to the “**Enrollments**” screen.

https://ihcdaonline.com/2012/MainPage.aspx?inline=false IHCA ClientTrack Training Indiana Housing & Commu...

File Edit View Favorites Tools Help

http--www.in.gov-ihcda-f... IHCA ClientTrack HMIS HelpDesk Unassign... Enterprise Rent-A-Car - R... RedDot Paychex eServices - Login

Welcome Brennan Butler (Training) Settings Help Sign Out V. 2012

ClientTrack ESSENTIALS Home Clients

Search Menu Find Client Intake Workflow

Case Management Client Dashboard Edit Client Family Members Assessments Enrollments Services Quick Services Standard Intake Client Services Report Case Notes Paused Workflows

SSN: 315-86-9789 Birth Date: 2/8/1980 ClientID: 909362

Ivy Flowers's Dashboard

Ivy Flowers's Information

Name: Flowers, Ivy	Birth Date: 2/8/1980	Age: 32
Gender: Female	Disabling Condition: No	Veteran: Yes
Ethnicity: Non-Hispanic/Latino	Race: Asian	

Photo

Ivy's Enrollments

Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
Current							
Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82)	2	09/07/2012		Aurora Inc	09/07/2012	1509937	

Ivy's Case Manager Assignments

Case Manager	Begin Date	Status	End Date	Enrollment
Brennan Butler	09/07/2012	Active		Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82)

Ivy's Services

Date	Service	Units	\$ Total	Organization
09/07/2012	Case/Care Management	1.00	\$0.00	Aurora Inc

To "Exit" a client click on the **"Blue Play Button"** and then click on the folder icon with the red arrow named **"Exit the Enrollment"**. This will launch an Exit Workflow.

ClientTrack ESSENTIALS

Welcome Brennan Butler (Training)

Home Clients

Search Menu

Find Client

Intake Workflow

Case Management

Client Dashboard

Edit Client

Family Members

Assessments

Enrollments

Services

Case Notes

Paused Workflows

Ivy Flowers SSN: 315-86-9789 Birth Date: 2/8/1990 ClientID: 909362

Ivy Flowers's Dashboard Enrollments

All of client's enrollments display below. An enrollment represents a defined period of participation in a grant and/or program. From here, you can enroll a client in a program, exit them from an existing program or perform annual assessment updates.

1 record found.

Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
Current Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82)	2	09/07/2012		Aurora Inc	09/07/2012	1509937	

Edit Enrollment

View Case Members

Case Summary Report

Review Entry Assessments

Perform During Program Enrollment Assessment

Exit the Enrollment

Cancel

Next, you will need to fill in the **“Exit Date”**, if you are doing back-data entry you will need to ensure that this has the correct date. Then you will fill in the Destination of the client as well as the Exit Reason. To remove someone from your Case Assignment, click on the check box next to **“End Case Assignment”**.

The screenshot displays the IHCD ClientTrack Training web application. The browser address bar shows the URL: <https://ihcdaonline.com/2012/MainPage.aspx?Inline=false>. The page title is "IHCD ClientTrack Training". The user is logged in as "Brennan Butler (Training)". The left sidebar contains a "Case Management" menu with options: Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Quick Services, Standard Intake, Client Services Report, Case Notes, and Paused Workflows. The main content area shows the "HUD Program Exit" form for "Ivy Flowers". The form includes the following fields:

- Exit Date: 09/07/2012
- Destination: Permanent Supportive Housing for formerly homeless persons (such as SHP, S+C, or SRO Mod Rehab)
- Exit Reason: Completed Program
- Case Manager Assignment: Brennan Butler
- End Case Assignment: [checkbox]

A "Save" button is located at the bottom right of the form.

Universal Data Assessment

Fill in the Housing Status for the client.

Literally Homeless – Individual or household who lacks a fixed, regular, and adequate nighttime residence

Unstably Housed – at risk of losing their housing

Imminently losing their housing – individual or household who will imminently lose their primary nighttime residence (within 14 days)

Stably Housed – Rent

Stably Housed – Own

Don't Know – Client has left and you don't know where they have gone

Refused – Client refused to give you any information

Other – Any housing status that is not above.

The screenshot displays the IHCD ClientTrack Training web application. The browser address bar shows the URL: <https://ihcdonline.com/2012/MainPage.aspx?Inline=false>. The application header includes the "ClientTrack ESSENTIALS" logo and a welcome message for "Brennan Butler (Training)". The left sidebar contains navigation links for "HUD Program Exit", "Case Management", and "Services". The main content area is titled "Universal Data Assessment" and includes instructions to "Complete the information below related to the selected client's housing status and other relevant information." The client's name is "Ivy Flowers" with SSN: 315-86-9789, Birth Date: 2/8/1980, and ClientID: 909362. The "Assessment Active" section shows the "Assessment Date" as 09/07/2012. The "Housing Status" section includes a dropdown menu set to "Stably Housed – Rent" and a "Restriction" section with radio buttons for "Restrict to Organization" and "Unrestricted". The "Save" button is highlighted in blue.

You will now be required to complete the HMIS Barriers assessment. The built in logic may create additional fields that are required. All fields with a red * are required. If the client has no barriers, click on the No

Barriers button in the lower right hand corner. It is important to keep in mind that clients must have at least one barrier to be eligible for some programs (such as Shelter + Care). Click **“Save & Close”** when completed.

The screenshot shows the IHCDA ClientTrack Training web application. The user is logged in as Brennan Butler (Training). The client being viewed is Ivy Flowers, with SSN: 315-86-9789, Birth Date: 2/8/1980, and ClientID: 909362. The 'Barriers' section is active, displaying a table of barriers for 'Assessment Active'.

Barrier	Help	Barrier Present?	Date Identified	Receiving Services / Treatment	Condition is Indefinite	Explanation
Alcohol Abuse	?	-- SELECT --				
Developmental Disability	?	-- SELECT --				
Drug Abuse	?	-- SELECT --				
HIV/AIDS	?	-- SELECT --				
Mental Health	?	-- SELECT --				
Physical Disability	?	-- SELECT --				
Chronic Health Condition		Yes	09/07/2012	Yes		

At the bottom of the page, there are buttons for 'Save', 'Save & Close', and 'No Barriers'.

Financial Assessment

An Income Assessment will be completed for EACH household member. Income received by a household member such as child support, TANF, WIC, and food stamps should be designated on the assessment of the

household member that directly receives the payment. If an adult receives an SSI or SSDI benefit on behalf of a child, that income should be designated on the income assessment of the child. It is very important that income (cash or non-cash) is properly designated on the proper client assessment.

Earned Income – Employment income

Other Income – Any income not previously listed

Unemployment Insurance – Unemployment benefits from the State

Private Disability Insurance – Non-government funded disability payments

Worker's Compensation – Income for individual who has been injured on the job

Self-Employment – Income earned by an individual who works for themselves

Supplemental Security Income – A federal program that provides additional income for older and disabled people with little to no income stream

Veteran's Disability Payment – Disability payment provided by the Department of Veteran's Affairs

Social Security Disability Income – A monthly compensation to individuals who can no longer work due to their medical conditions

Retirement (Social Security) – Income payment provided by government for individuals that qualify

Other Pension – Cash payment made from a private employer

Veteran's Pension – Cash payment made by the Department of Veteran's Affairs

Veteran's Disability Payment – A benefit paid to a veteran because of injuries or diseases that happened while on active duty, or were made worse by active duty

Child Support – Income received from one parent to another to care for children

TANF – Temporary Assistance for Needy Families

General Assistance – Cash from household or friends, trustee or church/non-profit

Click **"Save and Close"** when completed.

https://ihcdaonline.com/2012/MainPage.aspx?Inline=false IHCDA ClientTrack Training Indiana Housing & Commu...

File Edit View Favorites Tools Help

http://www.in.gov/ihcda-f... IHCDA ClientTrack HMIS HelpDesk Unassign... Enterprise Rent-A-Car - R... RedDot Paychex eServices - Login

Welcome Brennan Butler (Training) Settings Help Sign Out V. 2012

ClientTrack ESSENTIALS

Home Clients

HUD Program Exit
 Exit Enrollment
 Universal Data
 Barriers / Special Needs
 Income
 Non-Cash Benefits
 Employment
 Education

Case Management
 Client Dashboard
 Edit Client
 Family Members
 Assessments
 Enrollments
 Services
 Quick Services
 Standard Intake
 Client Services Report
 Case Notes
 Paused Workflows

Financial Assessment

Client: Ivy Flowers SSN: 315-86-9789 Birth Date: 2/8/1980 ClientID: 905362

Assessment Active

Assessment Date: 09/07/2012
 Income Received: Yes
 Non-cash Benefits: Yes

Income Group: Cash Income

15 records found.

Type	Description	Monthly Amount	Restriction
<input checked="" type="checkbox"/>	Earned Income	\$2,000.00	Unrestricted
<input type="checkbox"/>	Other Income		Unrestricted
<input type="checkbox"/>	Unemployment Insurance		Unrestricted
<input type="checkbox"/>	Private Disability Insurance		Unrestricted
<input type="checkbox"/>	Worker's Compensation		Unrestricted
<input type="checkbox"/>	Self Employment		Unrestricted
<input type="checkbox"/>	Supplemental Security Income		Unrestricted
<input type="checkbox"/>	Social Security Disability Income		Unrestricted
<input type="checkbox"/>	Retirement (Social Security)		Unrestricted
<input type="checkbox"/>	Other Pension		Unrestricted
<input type="checkbox"/>	Veteran's Pension		Unrestricted
<input type="checkbox"/>	Veteran's Disability Payment		Unrestricted
<input checked="" type="checkbox"/>	Child Support	\$300.00	Unrestricted
<input type="checkbox"/>	TANF		Unrestricted
<input type="checkbox"/>	General Assistance		Unrestricted

Count/Total Monthly Income: 2 \$2,300.00

Restrictions: ☐ Restrict to Organization ☒ Unrestricted

Save Save and Close

Financial Assessment Non-Cash Benefits

This section is specific to an individual, not the household. An Income Assessment will be completed for each household member. Again, there are limited selections that will pertain to children (Medicaid).

Food Stamps/Money for Food on Benefits Card – Monthly payments provided to individual in advance in a tax refund, Food Stamps (Snaps) – A stamp or coupon, issued by the government to persons with low incomes that can be redeemed for food at stores

MEDICAID – A joint federal and state program that helps low-income individuals or families pay for the costs associated with long-term medical and custodial care provided they qualify. Although largely funded by the federal government, Medicaid is run by the state where coverage may vary

MEDICARE – A federal program that pays for certain health care expenses for people aged 65 or older

Special Supplemental Nutrition Program for Women, Infants and Children (WIC) – A program geared toward supplying nutritional food for at risk pregnant women and their families

Veteran's Administration Medical Services - Health care benefits and services provided for Veterans

Section 8, Public Housing or Other Rental Assistance – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development

Other Source – Any source not previously listed above.

Click “**Save and Close**” when completed.

https://ihcdaonline.com/2012/MainPage.aspx?Inline=false IHCDA ClientTrack Training Indiana Housing & Commu...

File Edit View Favorites Tools Help

http--www.in.gov-ihcda-f... IHCDA ClientTrack HMIS HelpDesk Unassign... Enterprise Rent-A-Car - R... RedDot Paychex eServices - Login

Welcome Brennan Butler (Training) Settings Help Sign Out 2012

ClientTrack ESSENTIALS

Home Clients

HUD Program Exit

- Exit Enrollment
- Universal Data
- Barriers / Special Needs
- Income
- Non-Cash Benefits
- Employment
- Education

Case Management

- Client Dashboard
- Edit Client
- Family Members
- Assessments
- Enrollments
- Services
 - Quick Services
 - Standard Intake
 - Client Services Report
- Case Notes
- Paused Workflows

Ivy Flowers SSN: 315-65-9789 Birth Date: 2/8/1980 ClientID: 909362

Financial Assessment

Indicate below the client's sources of **monthly** income/benefits.

Assessment Active

Assessment Date: 09/07/2012
Income Received: Yes Non-cash Benefits: Yes

Income Group: Non-cash Benefit

7 records found.

Type	Description	Monthly Amount	Restriction
	Food Stamps/Money for food on benefits card		Unrestricted
	MEDICAID		Unrestricted
	MEDICARE		Unrestricted
	Special Supplemental Nutrition Program for Women, Infants, and Children		Unrestricted
	Veteran's Administration Medical Services		Unrestricted
	Section 8, Public Housing, or Other Rental Assistance		Unrestricted
	Other Source		Unrestricted

Count/Total Monthly Income: 1 \$0.00

Restriction: Restrict to Organization Unrestricted

Save Save and Close

Employment Assessment

When filling out the Employment Assessment, be aware that the built in logic may require you to fill out additional information. Click **“Save”** when completed.

The screenshot shows a web browser window with the URL <https://ihcdaonline.com/2012/MainPage.aspx?Inline=false>. The page title is "IHCDA ClientTrack Training". The user is logged in as "Welcome Brennan Butler (Training)". The page displays the "Employment Assessment" form for a client named "Ivy Flowers". The form includes the following fields and options:

- Assessment Date: 09/07/2012
- Employed?: Yes
- Hours Worked In Last Week: 40.00
- Employment Tenure: Permanent
- Looking for additional employment / increased hours: No
- Restriction: ☐ Restrict to Organization ☒ Unrestricted

The form also includes a "Save" button and a "No Changes" button. The left sidebar contains navigation links for "HUD Program Exit", "Universal Data", "Barriers / Special Needs", "Income", "Non-Cash Benefits", "Employment", "Education", "Case Management", "Client Dashboard", "Edit Client", "Family Members", "Assessments", "Enrollments", "Services", "Quick Services", "Standard Intake", "Client Services Report", "Case Notes", and "Paused Workflows".

Adult Education Assessment

When filling out the Adult Education Assessment, remember that certain answers will prompt the built in

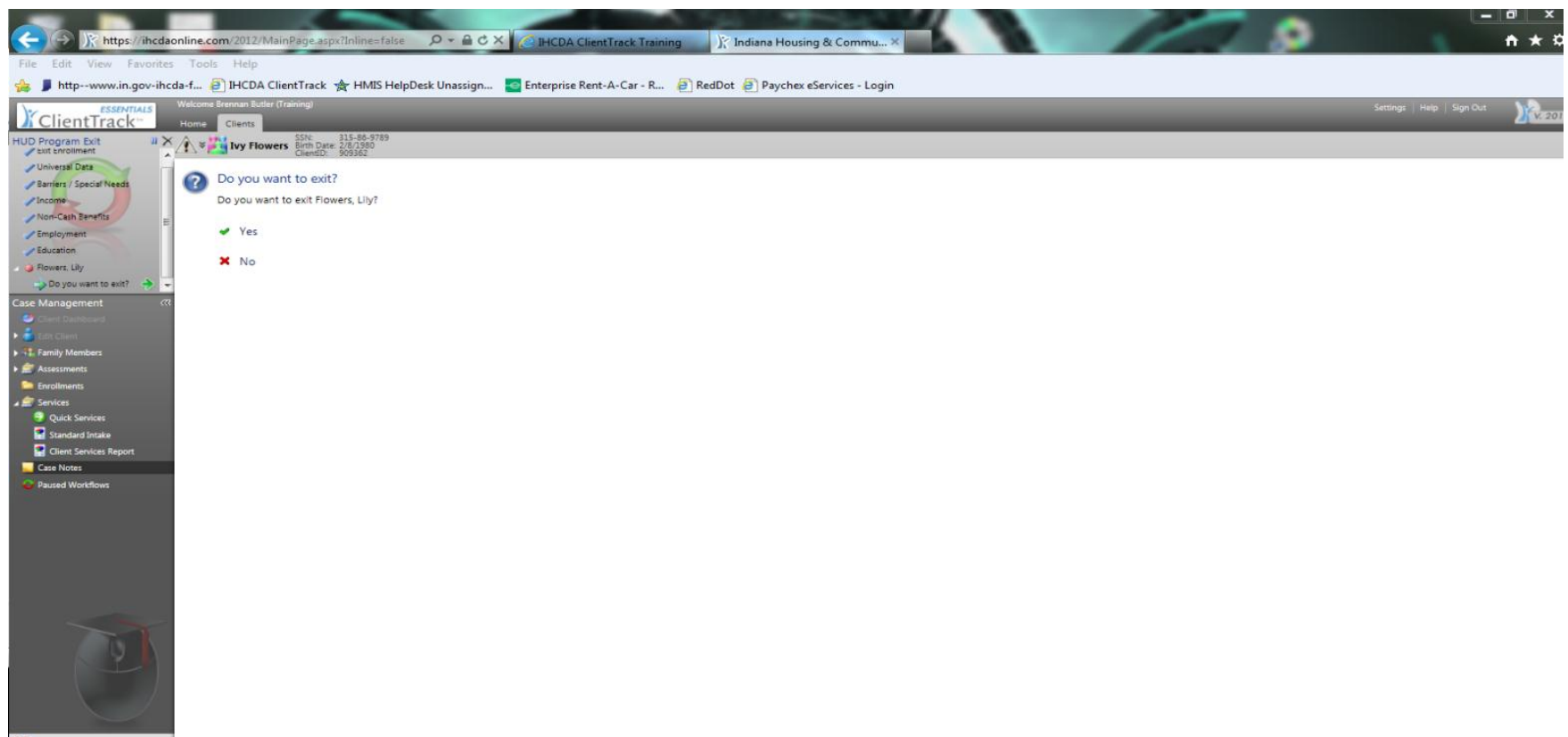
logic to require more information. Please note that if a client has had some secondary education, that you have selected “Post-Secondary School” and then select “None” in the Secondary Education box. Click “**Save**” to continue.

The screenshot displays the IHCDA ClientTrack web application. The browser address bar shows the URL <https://ihcdaonline.com/2012/MainPage.aspx?Inline=false>. The application header includes the ClientTrack logo and navigation links for Home, Clients, and Settings. A sidebar on the left contains a 'HUD Program Exit' menu with options like Universal Data, Barriers / Special Needs, Income, Non-Cash Benefits, Employment, and Education. Below this is a 'Case Management' section with links to Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Quick Services, Standard Intake, Client Services Report, Case Notes, and Paused Workflows. The main content area is titled 'Adult Education Assessment' and includes a 'Default Last Assessment' button. The form contains the following fields:

- Assessment Date: 09/07/2012
- Currently in School / Working on Degree: Yes
- Received Vocational Training/Apprenticeship: Yes
- Highest Grade Completed: Post-secondary school
- Secondary Education: A dropdown menu is open, showing options: None, Associates Degree, Bachelors (selected), Masters, Doctorate, and Other (with a link to nontraditional degrees).
- Restriction: Radio buttons for 'Restrict to Organization' and 'Unrestricted'.

The bottom right of the form has 'Save' and 'Pause' buttons.

Click the “**Yes**” Button to exit the next household member, and so on until all members are exited from the program. You will then be re-directed to the Client Dashboard.



Log out of ClientTrack

The screenshot displays the ClientTrack web application interface. At the top, there is a navigation bar with links for File, Edit, View, Favorites, Tools, and Help. Below this, a browser address bar shows the URL 'http--www.in.gov-ihcda-f...'. The main header area includes the ClientTrack logo and a welcome message for 'Brennan Butler (Training)'. On the right side of the header, there are links for Settings, Help, and Sign Out. The left sidebar contains a 'Search Menu' and a list of navigation options: Find Client, Intake Workflow, Case Management, Client Dashboard, Edit Client, Family Members, Assessments, Enrollments, Services, Case Notes, and Paused Workflows. The main content area is titled 'Ivy Flowers's Dashboard' and displays client information for 'Ivy Flowers'. The client's details include Name (Flowers, Ivy), Birth Date (2/8/1980), Age (32), Gender (Female), Disabling Condition (No), Veteran status (Yes), Ethnicity (Non-Hispanic/Latino), and Race (Asian). Below the client information, there is a section for 'Ivy's Enrollments' which lists two enrollments: 'Aurora - SHP Outreach (R12) - Aurora - Outreach Team (SSO-R12-82)' and 'Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82)'. The 'Ivy's Case Manager Assignments' section shows two assignments for 'Brennan Butler' on '09/07/2012', both with a status of 'Inactive'. The 'Ivy's Services' section shows two services: 'Case/Care Management' and 'Service', both with a date of '09/07/2012'.

Client Information:

- Name: Flowers, Ivy
- Birth Date: 2/8/1980
- Age: 32
- Gender: Female
- Disabling Condition: No
- Veteran: Yes
- Ethnicity: Non-Hispanic/Latino
- Race: Asian

Enrollments:

Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
Aurora - SHP Outreach (R12) - Aurora - Outreach Team (SSO-R12-82)	2	09/07/2012	09/11/2012	Aurora Inc	09/11/2012	1509941	
Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82)	2	09/07/2012	09/07/2012	Aurora Inc	09/07/2012	1509937	1509939

Case Manager Assignments:

Case Manager	Begin Date	Status	End Date	Enrollment
Brennan Butler	09/07/2012	Inactive	09/07/2012	Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PH-R12-82)
Brennan Butler	09/07/2012	Inactive	09/11/2012	Aurora - SHP Outreach (R12) - Aurora - Outreach Team (SSO-R12-82)

Services:

Date	Service	Units	\$ Total	Organization
09/07/2012	Case/Care Management	1.00	\$0.00	Aurora Inc
09/07/2012	Service			Evansville Rescue Mission

To log out of ClientTrack, click on the **“Sign Out”** link at the top right hand corner of your screen.

How to Contact the Help Desk

- Email the help desk at HMISHelpDesk@ihcdaonline.com
- Include:
 - Your Name
 - Contact Phone Number
 - Agency Name
 - Program you are working with
 - A description of the issues you are having
 - If possible a screen shot of the error you are receiving
- Allow 1– 2 business days to receive a response.

Notes

- Please remember, the **“Save”** button will save the changes you made to the screen and leave you on the same page. The **“Save & Close”** button will save the changes you have made to the screen and move you to the next one.
- IHCDCA will monitor time between user logins and your ClientTrack™ account will be deactivated after 30 days of inactivity.
- Grant and program information must be set up in the system before you can begin to enroll clients. You must give adequate time to IHCDCA in order for the set up in ClientTrack™ to be completed.
- While you will have the option on many screens for a “Don’t Know or Refused” option – which may be valid at time of intake – it is expected that as information is collected during the program enrollment the client information/assessments will be updated